Final Report
Labour Market Survey

Prepared For
Department of Advanced Education and Labour
Fredericton, NB

Prepared By
Baseline Market Research Ltd.
April 14, 1992

92-05976/

Table of Contents

Executive Summary

Introduction 1

Project Objectives 1

Research Approach 2
- Preliminary Research 2
- Questionnaire Design 2
- Primary Data Collection 3
- Sample Selection 3
- Data Analysis 7

Research Findings - The Survey of Households 7
- Characteristics of Respondents 7
  - Age Distribution 7
  - Education Background 8
  - Income Levels 9
  - Other Sample Characteristics 10
- Labour Force Estimates 10
- Work Place Experience 14
  - General Work Experience 14
  - Employment in the Study Area 17
  - The Unemployed Worker 22
  - Unemployment Insurance 24
- Training 26
  - Introduction 26
  - Past Experiences 27
  - Future Training Interests 30
- Mobility and Expectations of Workers in the Study Area 36
  - Mobility of the Workers 36
- Perceptions of Value as an Employee 40
  - Wage Expectations 41
- Summary of Findings from the Household Survey 45

Research Findings - The Business Survey 48
Economic Outlook 48
Business Profile 52
Description of Business Study Participants 52
Corporate Competitiveness 55
Distribution of Employees within Business Classifications 59
Employment and Retention of Employees within Sample Firms 63
Educational Requirements for Employment 63
Recruitment of Employees 64
Turnover Rates 66
Training within Sample Firms 70
Current Training 70
Future Training Needs 74
Business Growth in the Study Area 79
Barriers to Economic Growth 81
Summary of Findings from the Business Survey 87

Charlotte County and the Acadian Peninsula 89

Recommendations From the Research 92

Appendix A: Bibliography
Appendix B: Questionnaires
Appendix C: Moderator's Guides and Participant Profiles

Executive Summary

In order to develop a more in-depth understanding of the Charlotte County/McAdam area labour market the New Brunswick Department of Advanced Education and Labour and the New Brunswick Regional Development Corporation commissioned telephone surveys and focus groups of both the business community and the general population.

This study was designed to accomplish the following:

- to obtain primary research data on the Study Area with a view of understanding better its characteristics, identifying its strengths and weaknesses in order to provide the basis for the initiation of appropriate action to ensure the area has the necessary skills to meet current and future labour market needs; and

- to attempt to determine the future employment opportunities the area has to offer its workforce.

Summary of Findings from the Household Survey

Our observations on the responses and discussions from this research lead to the perception that many people in the area want work - they want the same type of work that has always been available. A large scale factory which paid a reasonable wage could find an ample supply of workers in the area. If such a place offered full-time, year-round employment, workers would be available and willing to work - if employers did not condone the cycle of temporary workers replaced by other temporary workers. However, under present conditions, such an opportunity is not available, people do not want to relocate and they accept what is available - in some instances that is employment, in other instances UI, social assistance or reliance on family members.

Few people involved in this study expressed high expectations in relation to employment. Respondents were prepared to make a trade-off between personal lifestyle choices and the level of economic reward. Realistically, many in the sample did not provide evidence of having the skills on which to base high expectations. Perhaps this lack of skill is closely linked to employment opportunities in the area: few jobs actually offer extensive training leading to a progressive development of advanced skills, increasing levels of authority or responsibility or significant increases in salary/pay levels.

We did notice that there is a survival instinct that is similar to the skills required of an entrepreneur. People in this study are tenacious in their desire to maintain their lifestyles; they are creative and innovative in doing what needs to be done to survive. Some of their practices such as failure to report income earned in the Christmas wreath industry are questionable, if not illegal, but this particular practice is accepted as the norm in the community - "it's how people get the money to heat their homes and buy Christmas presents for the kids." Bartering is common in the region. Shopping in the US is considered a necessity to survive on the pay scale in the area - and it's an accepted practice for most of the people in the area. Some participants suggested that perhaps a return to a less complicated society would be good for people in the area - that difficult times may bring the community even closer and perhaps increase people's sense of independence.

We also noted that people in the community were as likely to voice criticism of UI as were employers but respondents were also far more likely to suggest that the end of UI would spell economic disaster for the area - in some instances resulting in suicide for those who could not find employment. People indicated that social assistance was the last step - the step which indicated that a person had given up and was no longer interested in work (referring to those who had to move from UI to social assistance).

While many recognized the importance of UI for the region, most also cited examples of how UI limits the motivation to work - that jobs go unfilled because people can receive more from UI than from employment. However, the participants who criticized people for not taking jobs that were available did not criticize the fact that people receiving UI receive cash payment for work and fail to report that income - to not accept "any" job is unacceptable; to "get around" the system is tolerable.

Training for skills updating or future opportunities is not a 'top-of-mind' issue. If training is directly related to work, it may be considered, if not, it would require more encouragement. Few participants indicated that they had given much thought to the potential for changing demands of the workplace. In fairness, we doubt that few, other than experts in observing labour market demands, are giving serious thought to skills acquisition for the future - most are too busy with their current lives and work.

Participants recognized that the future for the area may not be optimistic. They see young people moving away, businesses closing and yet few really want to leave: perhaps the fear of the unknown is much greater than the economic and employment situation in the area.

Summary of Findings from the Business Survey

This part of the total research effort was designed to provide a future-oriented perspective on the attitudes, intentions and behaviours of the business community in the Study Area. The following points summarize the information collected through personal interviews, a telephone survey and focus groups:

- The business community, in general, is cautiously optimistic about the economic future of the region. Many implied that it would be difficult to imagine more difficult times than those of 1991.

- The business community sees itself as being as competitive as it can be. Comments suggest that they also believe that they are not operating on a level playing field with their US counterparts as a result of government action in the areas of taxation and regulation.

- There appears to be an increase in the number of positions available within sample firms in 1992. That change appears to be based on an increase in the number of full-time positions and a decrease in the number of part-time positions.

- Employers anticipated little change in the type of employee that might be needed in the future - they indicated only a minor change in the level of educational attainment which will be demanded in the future and little change in the skills required (based on their perspective on future training needs).

- Most employers hire locally and claim to have little difficulty in staffing their operations. However, the smaller the business and the lower the rate of pay, the more difficult the staffing of an operation.

- Comments suggest universal agreement on the need to reform current practices related to UI. Employers believe that the current system serves as a disincentive for work - that it contributes to the growth of a labour pool which lacks motivation and not interested in year-round, full-time employment. At the same time, some participants in this survey recognize that they cannot provide full-time employment and need UI to ensure the availability of a stable work force for their seasonal operations.

- Training was provided by the majority of firms in this study. The training provided was primarily an on-site process delivered by in-

house staff and specifically related to learning the skills required for a particular job. There did not appear to be a great deal of emphasis placed on employee development.

- Future training needs were undefined other than a general knowledge that employers will have to provide skills upgrading in relation to specific jobs and increased computing skills for their employees.

- The major problems facing business in the Study Area in January, 1992 involved trying to remain solvent and trying to remain competitive.

- The business community suggested that aquaculture and tourism represent the future growth areas.

- The major barriers to economic growth in the region were identified as government policies, population characteristics, access, the structure of the business community and overall economic conditions.

- The business community seemed to assign the responsibility for economic development of the region to different levels of government (sometimes in conjunction with the business community). A key task for governments is the reduction in the level of taxation applied to business and in the rate of tax charged to consumers.

- When asked about their level of satisfaction with current economic development efforts by different groups and governments, respondents indicated higher levels of satisfaction with local organizations and governments than with the federal or provincial governments.

Recommendations From the Research

Research recommendations are based on the experience, observation and interpretation of information by the staff of the research firm. In a sense, they represent an opinion and, as such, are not considered as objective information. Within this context, Baseline makes the following recommendations to those responsible for planning for the long-term future of the Study Area.

Summary of Findings from the Business Survey

This part of the total research effort was designed to provide a future-oriented perspective on the attitudes, intentions and behaviours of the business community in the Study Area. The following points summarize the information collected through personal interviews, a telephone survey and focus groups:

- The business community, in general, is cautiously optimistic about the economic future of the region. Many implied that it would be difficult to imagine more difficult times than those of 1991.

- The business community sees itself as being as competitive as it can be. Comments suggest that they also believe that they are not operating on a level playing field with their US counterparts as a result of government action in the areas of taxation and regulation.

- There appears to be an increase in the number of positions available within sample firms in 1992. That change appears to be based on an increase in the number of full-time positions and a decrease in the number of part-time positions.

- Employers anticipated little change in the type of employee that might be needed in the future - they indicated only a minor change in the level of educational attainment which will be demanded in the future and little change in the skills required (based on their perspective on future training needs).

- Most employers hire locally and claim to have little difficulty in staffing their operations. However, the smaller the business and the lower the rate of pay, the more difficult the staffing of an operation.

- Comments suggest universal agreement on the need to reform current practices related to UI. Employers believe that the current system serves as a disincentive for work - that it contributes to the growth of a labour pool which lacks motivation and not interested in year-round, full-time employment. At the same time, some participants in this survey recognize that they cannot provide full-time employment and need UI to ensure the availability of a stable work force for their seasonal operations.

- Training was provided by the majority of firms in this study. The training provided was primarily an on-site process delivered by in-

house staff and specifically related to learning the skills required for a particular job. There did not appear to be a great deal of emphasis placed on employee development.

- Future training needs were undefined other than a general knowledge that employers will have to provide skills upgrading in relation to specific jobs and increased computing skills for their employees.

- The major problems facing business in the Study Area in January, 1992 involved trying to remain solvent and trying to remain competitive.

- The business community suggested that aquaculture and tourism represent the future growth areas.

- The major barriers to economic growth in the region were identified as government policies, population characteristics, access, the structure of the business community and overall economic conditions.

- The business community seemed to assign the responsibility for economic development of the region to different levels of government (sometimes in conjunction with the business community). A key task for governments is the reduction in the level of taxation applied to business and in the rate of tax charged to consumers.

- When asked about their level of satisfaction with current economic development efforts by different groups and governments, respondents indicated higher levels of satisfaction with local organizations and governments than with the federal or provincial governments.

Recommendations From the Research

Research recommendations are based on the experience, observation and interpretation of information by the staff of the research firm. In a sense, they represent an opinion and, as such, are not considered as objective information. Within this context, Baseline makes the following recommendations to those responsible for planning for the long-term future of the Study Area.

People Development

The attitudes and behaviours demonstrated in this research effort suggest a somewhat complacent population which is essentially satisfied with their lifestyle and which has limited expectations for a significant improvement in the economic conditions of the region. In many instances, people have accepted seasonal or term employment and prefer that option to the thought of giving up their lifestyles in order to seek full-year employment or greater economic return elsewhere. Regardless of the current level of satisfaction, few indicate that there is great hope for the ability of the region to provide a positive economic opportunity for future generations.

If, in the current state of change in the world, the Charlotte County area has the option to remain static, there is not a need for action. However, we suggest that inaction is not affordable for New Brunswick or for Canada. At the same type, we recognize that there are no short-term solutions for the Study Area.

If the region is to move to more independence and self-reliance, the people of the area will have to acquire the needed orientation and skills. If people are to take control of their lives and have higher expectations, such will have to be encouraged. We suggest that assistance and programs which provide part-year work are short-term solutions - although they have been used to sustain the population of the Study Area for years.

If attitudes are to change, they will only change over time. Certainly, the provincial government recognizes the need to change attitudes if the concept of self-reliance is to become applicable to New Brunswick. If change does not take place, self-reliance for New Brunswickers refers to the ability to survive the time between a part-year job and receipt of UI.

Education and Training

We suggest the need for the improvement of the education curriculum to support and develop an orientation towards change, risk taking and increased expectations. If people are to have more control and more autonomy, they have to come to demand that and be willing to assume responsibility for their lives. If people continue to believe that all will continue in the future as it has been in the past, there is no incentive for change. The educational system provides the opportunity to reach an entire segment of the population. We suggest that governments have, in many ways, encouraged the population's dependency on government. It is now time for those governments to encourage self-

reliance. A revised approach to education and the orientation that people receive is a crucial step in that process.

If people become more oriented to change, they may be more likely to consider the need for the acquisition of skills and a more career-oriented perspective on their lives. When work becomes only a series of jobs with limited opportunity for advancement or improvement, there is little incentive for personal improvement. If attitudes can be changed and, at the same time, meaningful training opportunities provided, one can hope that change will result.

We suggest that public education is also essential. The confrontation with the economic realities of today is a part of the public education process, but a more positive, and more time consuming approach rests in efforts to make New Brunswickers and residents of the Study Area more aware of the uncertainty of the future. In this study, many people had not considered the possibility of a loss of UI or a significant structural change in the economy of the province. However, those are realities or potential realities. A positive economic future for this province rests on the ability of its business community to diversify and the ability of its work force to provide the resources necessary for that diversification. The people of this province have to face that reality.

Employment and Changes in UI

The people of the region also simply need to work. While we recognize the need for a social safety net, as long as people have the opportunity to refuse or avoid work when jobs are available, they are being allowed to ignore future realities. While we recognize that work is not the answer for all social problems, we also recognize that the lack of work is a major contributor to longer term social problems. The lack of work for the population at large is a significant problem; the lack of work for those entering the workforce is a critical problem. We recommend that efforts be accelerated which will provide jobs or training opportunities for people receiving UI and those receiving Income Assistance who are able to work. We recommend that changes be made which mandate that those who are unemployed be required to work in either public or private sector workplaces which provide "real world" jobs - not undemanding make work programs. If people continue to have the option to not work for 40 weeks a year, why should they be expected to change? Given the current level of subsidy for business in Canada and New Brunswick, we are not concerned about the use of work programs to subsidize business. If labour is provided and subsidized through UI, the corporate taxation policies can be changed to accommodate such programs. Given the high percentage of unemployed people, we have to look at different options

- if we believe that a job/career can make a positive contribution to the people of this province.

In essence, the solutions are not simple. Attitudes and behaviours of the population have to be changed. If environments are not created which encourage people to have higher expectations, the change will be external, negative and economically devastating for this region. People need to work; we believe they should be required to work, if jobs are available.

Business Development

Unless governments are prepared to accept the full responsibility for economic development, they will have to begin the process of attitude change within the business community. A business community of a area is made up of the people of the area - so the problems identified above are equally applicable.

No one can argue that it is a difficult time to be in business. However, there are successful and energetic businesses that are doing well today, and some of those are in the Study Area. However, as with the banking industry, many businesspeople have ceased to be willing to take risks or make changes. A part of those changes must be generated within the actual business operations. There will have to be changes in the distribution systems, in the internal operating systems, and in the training and development of employees. However, businesspeople have to be encouraged to undertake such programs - they have to be encouraged to change their attitudes. Such can be facilitated through exposure to new ideas - exposure to new ways of operating and, perhaps, assistance to those businesses that are willing to change and expand the potential for the region. We have been involved with people in this area for several years - and we have heard the same comments repeatedly, even as economic conditions worsen. Perhaps the exposure to people who have been successful in similar areas can be used as a vehicle to stimulate business development. Business has become too dependent on government solving its problems. If a more entrepreneurial spirit is not rekindled we will see, as participants predict, a continuing decline in business activity in the region.

Business - Directed Development

A contributor to the current situation is a malaise within the business community - a malaise based on the belief that they can't be successful - that too many external factors limit their growth. Our observations

suggest that limitations are as much internal to the business owners as external. We suggest that business leaders in the area be challenged to develop new business - primarily small business operations. We suggest the need to test and re-orientate the business community in the Study Area. To this end, we suggest a pilot project for the area. Without using any of the existing business development groups, we encourage the set up of a group of 10 business people who will be charged with the development of businesses appropriate to the area. Through a cooperative effort, we suggest that this group be charged with the appropriation of a limited amount of funds for business starts. The decisions on the type of businesses would rest entirely within this group and the primary objective would be the creation of businesses which build on existing resources and provide a meaningful work situation for area residents. In this project, the business people would be accountable for their investment decisions while being provided the opportunity to make a positive contribution to the region. We recommend a two year test period. This approach would provide the opportunity for the local business community to actually take charge of a portion of economic development of the region. Success may provide future resources to fuel private sector regional development.

Taxation Policies

We concur with some of the suggestions made by members of the business community. However, tourism will not develop under the current economic conditions. The natural beauty of the area will not overcome the problems created by high consumption taxes and a strong dollar. If taxation and fiscal policies are not altered, the "pass-through" province has a great potential to become the "turn-around" province - tourists enter, take a look at prices and turn around immediately. The net effect of a revision in these policies will require revision of the corporate tax rates and reduced government expenditures. Until a more positive economic climate is provided for the potential tourist, we suggest that investment in tourism infrastructure will do little more than create more short-term employment for the region.

Government Encourages and Regulates

We also concur that the aquaculture industry represents a growth opportunity. However, we do not see the benefits of subsidy for that industry. The industry is world-wide and the competition is fierce. The industry has to build on its strength and it has to be competitive. We believe that the only appropriate roles for government are regulation - regulation which ensures quality and facilitates rather than hinders the

growth of the industry and encouragement of development within the industry. The major resources needed by this industry are in place.

Government Recruits

As suggested in our approach to venture capital, we suggest that the region will develop through small business. While the pool of labour is available, we see little opportunity for the development of a large manufacturing operation in the region. Competition for those operations are world wide. Given the potential for a North American FTA, the large-scale solution seems more remote. However, small business development comes from a pool of people willing to take a risk. If that pool of people is not found in the area, we suggest that government should play a role in recruiting people who want to have the quality of life New Brunswick can offer and run a small business. Certainly, as many business publications indicate, there is a pool of skilled managers, unemployed as a result of the recession and unlikely to find the same types of jobs post-recovery, who are considering small business start-ups. The promotion of New Brunswick to this market could be a way of attracting new residents and new businesses. However, such will be contingent on the resolution of the current constitutional crisis. If the Maritimes are distanced from the rest of Canada by an independent Quebec, given the current perceptions of the region within confederation, it is highly unlikely that this area would be considered as an attractive place in which to invest.

Future Studies

While not included in this report, we suggest that every aspect of the region which could be studied has been studied. At our business risk, we suggest that further allocation of resources for studies would be better invested in business development activities. We suggest that those who are involved with this region compile all known reports, and review the recommendations that have been made, identify the consistent patterns and act on those recommendations.

We further suggest that there be no more efforts to understand those parts of this province which are having difficulty. The commonality of information from this study and the one in the Acadian Peninsula suggest that the downside of the problem is documented. If other studies are to be conducted, we suggest that resources be allocated to determining why a community is successful in order to provide the basis for trying to stimulate success in other areas.

Summary

We recommend a long term approach for the region - one which focuses on changing attitudes and habits and one which changes some of the rules for existing programs. While business in the region suggests that governments have not done an excellent job in trying to solve the economic development problems of the region, they suggest that governments should be given the primary responsibility for the future. We suggest that people in the area, as a part of becoming more independent, have to assume a large part of the responsibility for the development of their region with less reliance on government assistance. If the people of the region do not make a significant contribution to its future, we envision a future more like the past with less government assistance.

Introduction

Baseline Market Research Ltd. (Baseline) completed a comprehensive study of labour market conditions in the Charlotte County/McAdam Area (Study Area) in the first three months of 1992. This report provides a detailed summary of that study. This study was sponsored by the New Brunswick Department of Advanced Education and Labour (the Department) and the NB Regional Development Corporation.

This research is the second step in a process to develop a more in-depth understanding of each labour-market area in the province. The first study was carried out in the Acadian Peninsula and, wherever possible, this report provides a comparison of information collected on the two areas.

This report first presents a summary of the objectives which directed this project and the methodology employed, followed by a summary of the information collected through surveys and focus groups involving the residents of the Study Area and members of the business community.

Project Objectives

This study was designed to accomplish the following:

- to obtain primary research data on the Study Area with a view of understanding better its characteristics, identifying its strengths and weaknesses in order to provide the basis for the initiation of appropriate action to ensure the area has the necessary skills to meet current and future labour market needs; and

- to attempt to determine the future employment opportunities the area has to offer to its workforce.

This project was a collaborative effort between the Department, the consulting firm and the Working Group established by the Department. The Working Group was made up of representatives from the Department, Canada Employment and Immigration, the NB Regional Development Corporation and the NB Statistics Agency.

The following section describes the overall research approach for this study.

Research Approach

Baseline developed a research approach which incorporated several aspects of research: review of secondary data, quantitative research (involving in-depth personal and telephone interviews) and qualitative research involving focus groups.

Preliminary Research

After initial contact with the Working Group to clarify the research objectives and course of this project, Baseline began a review of existing studies and preliminary contacts to develop a firm grasp of the information available for this area.

The bibliography in Appendix A summarizes the relevant studies which were identified in the course of preliminary research. Information from relevant studies are incorporated in different sections of this report.

This project involved similar data-collection approaches with two distinct groups: employers and the labour force. The following outlines the overall process.

Questionnaire Design

Baseline initially reviewed the questionnaires developed for the Labour Market Study of the Acadian Peninsula. Significant revisions were made, however, to both surveys. Certain questions were retained to provide a basis for comparison of the results.

The questionnaires for the household and business surveys are included in Appendix B.

The questionnaires were approved by the Working Group and pretested on a sample of 50 respondents for the household survey and 10 respondents for the business survey prior to use for data collection. In

the pretest, each respondent was informed that they were being interviewed as a part of a pre-test and was asked for their cooperation. From Baseline's perspective, respondents were helpful and the changes resulting from the pretest were discussed with the Working Group prior to the actual survey.

Primary Data Collection

Baseline collected information from both area residents and business people through the use of telephone interviews and focus groups. We also collected information from the business participants through a limited number of personal interviews.

All telephone interviews were completed through our central interviewing facility in Fredericton. Interviewers were oriented to the different stages of this project prior to data collection. The Household Survey involved most of Baseline's interviewing staff while the Business Survey was conducted by our more senior interviewers.

Throughout the interview process, all interviewers were supervised by Baseline's in-house staff. Interviews were checked for accuracy and any additional or clarifying information was collected immediately following the editing process.

The focus groups were conducted in St. Stephen and McAdam (three groups of respondents from the Household Survey and two groups of business people). The moderator's guides for the groups were developed after discussion with the Working Group. These are included in Appendix C, along with a brief profile of the participants in each group. The information from these groups is incorporated into the research findings section of this report.

Sample Selection

Baseline's sampling approach for the Household Survey involved a proportionally-allocated sampling procedure which used random-digit dialling to access all possible households in the Study Area. The sample consisted of 1000 respondents for the Household Survey and the overall accuracy of the data, at the aggregate level (Labour Market Area), is within the range of $\pm$ 2-3%, at the 95% level of confidence. The margin

of error increases for subgroup analyses, such as an analysis of groups based on age or gender.

All telephone interviews for the Household Survey were conducted between January 5 and January 26, 1992. Focus groups met in February.

At least four call-backs were made to reach respondents not contacted on the first effort. The following table summarizes the contact efforts required to complete this survey:

Table 1 Household Survey: Contact Summary

Type of Contact	Calls
Total Numbers Used	2688
LESS	
Numbers not in Service	796
Disqualifications	
• Respondent not in age group, household not in area or business number	321
• Selected Respondent not Available	38
• Respondent not reached after four call backs	225
TOTAL ELIGIBLE NUMBERS	1308
LESS: Refusals	306
Total Completes	1002
Response Rate	76.6%

A response rate of 76% is above-average for a survey involving random digit dialling.

The Business Survey involved a stratified sampling of 390 area businesses. The stratification was based on the number of employees within a company. The participating businesses were drawn through a listing supplied by C.E.I.C. in St. Stephen. The margin of error for the

aggregate data for the Business Survey is within the range of ± 3-6% at the 95% level of confidence.

There was a slight problem in drawing the sample for the Business Survey. The original plan called for the following interview approach:

- completion of interviews with all firms with 25 employees or more;
- completion of interviews with 20% of all firms with 10 to 24 employees; and
- completion of interviews with 20% of firms with 1 to 9 employees.

Initially, contact with the regional office for C.E.I.C., and subsequent statements in the Research Proposal, indicated that there were 5 firms with 25 or more employees, 131 with 10-24 employees and 1792 firms with 1-9 employees. However, there was a difference in the number of firms in each category on the lists supplied, resulting in the following distribution of all firms:

Table 2 Business Survey Distribution

	Listing From C.E.I.C.	Sample
Firms with more than 25 employees	77	28
Firms with 9-24 employees	130	67
Firms with 1-9 Employees	1722	295
Total	**1929**	**390**

Regardless of this change in expected distribution, it is our professional opinion that the sample involved in this research on the business community, in conjunction with the participants involved in personal interviews and focus groups, provides a representative sampling of the total business community within the area.

All telephone interviews for the Business Survey were conducted between February 12 and February 26, 1992. Focus groups were held in March. Personal interviews were completed in the initial and later stages of the research.

The following table summarizes the contact effort required to complete 390 interviews:

Table 3 Contact Summary: Business Survey

Type of Contact	Calls
TOTAL NUMBERS USED	1067
LESS NUMBERS:	
Not-in - Service	180
Not-In -Service Area	4
Not available during study period *	334
Out-Of-Business	76
Duplicates/Multiple Business	29
TOTAL ELIGIBLE NUMBERS	444
LESS: Refusals	54
Total Completes	390
Response Rate	88%

* This number includes all seasonal businesses, 42 businesses whose owners who were on vacation during the study period and all businesses which could not be reached through 4 call backs (primarily owner-operated businesses or 1-2 person operations in areas such as construction).

The response rate of 88% is exceptionally high for a survey of this type, perhaps indicating the respondents' level of interest in the research topic.

Data Analysis

All data were edited, coded and computerized by Baseline's field and supervisory staff.

Data analysis was completed by our senior research staff. All data was analyzed using SPSS, a computer software package and computerized information will be maintained for thirteen months. Physical records will be maintained for two months and material for survey audit are maintained for two years. The analysis involved two and three way analysis of categorical variables and summation and calculations of group and subgroup means for rational data along with appropriate tests of statistical significance.

The following sections detail the research findings generated through the approach outlined.

Research Findings - The Survey of Households

The material in this section is based on information obtained through telephone interviews with 1000, randomly selected residents of the Study Area who were between the ages of 15 and 65 years.

Characteristics of Respondents

The following tables provide a profile of the population of the area and of the participants in the Household Survey.

Age Distribution

There are approximately 17,500 people in the Study Area between the ages of 15 and 65 years. Table 4 provides information on the age distribution for the respondents who participated in this survey and compares that distribution to known information about the province and the region.

As can be observed from Table 4, the sample somewhat under-represents the overall population in terms of the younger age groups and over-represents the 35-44 age group. This is not difficult to understand, given that younger respondents are less confident and less likely to be interested in this type of survey while those in the middle age group are most easily reached and more familiar with surveys, in general. When necessary, data was weighted on the basis of age during the process of analysis.

Table 4 Population Distribution of the Labour Market Area and NB(*)

Age Categories	Province 1992(1)	Study Area 1989 est.(2)	Sample 1992
15 - 19 Years	56,000 11.6%	2100 12%	52 5.2%
20 - 24 Years	55,000 11.4%	2100 12%	66 6.6%
25 - 34 Years	119,000 24.6%	4300 24.6%	266 26.6%
35 - 44 Years	114,000 23.6%	3600 20.6%	271 27.1%
45 - 54 Years	76,000 15.7%	2600 14.9%	177 17.8%
55 - 64 Years	58,000 11.9%	2500 14.3%	151 15.1%
65 Years	5,800 1.2%	300 1.7%	17 1.6%
TOTAL	**483,800** **100%**	**17,500** **100%**	**1,000** **100%**

1 Source: Statistics Canada Catalogue 71-001 (Jan. 1992)
2 Source: Statistics Canada Catalogue 91-206

Education Background

The following table compares information on the level of educational attainment for the province and the sample.

Table 5 Education Levels for the Labour Force of the Province and the Sample

Education level completed	NB(1)	The Sample
Grades 0-8	10%	10.1%
Some Secondary Education	20%	17.3%
High school graduate	24.5%	32.4%
Post Secondary	8.5%	5.7%
Post Secondary Certificate	26%	25.1%
University Degree	11%	9.3%

1 This information is based on the 1991 Annual Estimates from the Labour Force Survey

Data collected in this study indicates that the sample for the area does not appear to differ significantly from the information available for the Labour Force of the province.

Income Levels

The average family income for the province was $ 41,172 according to 1990 data supplied by Statistics Canada. The following table presents the reported personal and household incomes for respondents.

Table 6 Income Distribution for the Household Survey

Annual Income - 1991	Individual Income	Household Income
Under $ 20,000	63%	23%
$ 20 - 29,999	19%	24%
$ 30 - 39,999	10%	22%
$ 40 - 49,999	5%	13%
$ 50 - 59,999	1%	7%
$ 60,000 or more	2%	11%

While this data is not exactly comparable, the percentage of respondents claiming individual income under $ 20,000 is not inconsistent with data in the Labour Force Income Profile for Charlotte County (1988) which indicates that the median income (personal) from employment was $11,700 and the overall median income (all sources of income for tax filers) was $13,200.

Other Sample Characteristics

The participants in this study lived in households with an average of 3.07 people (including themselves).

Consistent with population patterns:

- 50.4% of the participants were females; and
- 70% were married, 3% were separated, 7% were divorced, 3% were widowed and 17% were single.

Most of the survey participants (77%) had lived in the Study Area for more than 10 years (and in many instances for most of their lives).

Ninety-four percent of respondents resided in Charlotte County, the balance resided in the McAdam Area.

Labour Force Estimates

A labour force participant refers to that percentage of people, fifteen years of age or older, who, when asked, indicated that they were employed or unemployed and actively seeking employment.

According to data from this study, the labour force participation rate for the sample studied was 72.3% This is based on the following categorization of respondents:

LABOUR FORCE PARTICIPANTS

Employed People	n= 546
Active Employment Seekers	n= 166
Employed Students	n= 11
Total LF Participants	n= 723

NON-PARTICIPANTS

Unemployed - Not Seeking Employment	n= 71
Retired People	n= 34
Disabled People	n= 36
Full-Time Students	n= 52
People at home	n= 84
Total Non-Participants	n= 277

The demographic profile of the Labour Force Participants in this study is presented in the following table:

Table 7 Demographic Profile of the Labour Force	
Demographic Characteristics	Percentage of Labour Force
Age Distribution	
15 - 19 years	2%
20 - 24 Years	6%
25 - 34 Years	29%
35 - 44 years	32%
45 - 54 years	19%
55 - 64 years	11%
65 years	<1%
Gender	
Males	54%
Females	46%
Education Level Completed	
0-8 Grades	7.1%
Some Secondary	14.3%
High School Graduate	32.7%
Post Secondary	5.6%
Community College/Other - Diploma	28.3%
University Degree	12.1%

Data for the counties within the Study Area is not available; however, data for the Region (including Kings, Saint John and Charlotte County) indicates the following:

- in 1991, the participation rate for the Region was 63.4% (based on a 12 month average of percentages reported in the Labour Force Survey for 1991);

- in January, 1992, the participation rate for the Region was 60.4%; and

- in February, 1992, the participation rate for the region was 59.7% (the rates for January and February are based on a three-month moving average).

The following table summarizes the participation rate for the various age groups in the area and the province (based on information from Statistics Canada, Catalogue # 71-001, for January, 1992) and sample data collected in January, 1992.

Table 8 Labour Force Participation Rates

Age Categories	Province 1992	Sample 1992
15 - 19 Years	35.9%	32.7%
20 - 24 Years	66.5%	68.2%
25 - 34 Years	75.1%	78.9%
35 - 44 Years	74.6%	84.1%
45 - 54 Years	70.2%	78.0%
55 - 64 Years	39.9%	51.7%
65 Years	NA%	35.7%

The higher than expected participation rate may be explained, in part, by:

- the fact that this study included no one older than 65 years of age; and

- the sample distribution which over-represented population characteristics in relation to age, especially in the 35-44 age group, a group with a high participation rate.

The unemployment rate represents the total percentage of labour force participants who are unemployed and actively seeking employment. According to survey data, 166 respondents in the total participant group of 723 were unemployed and actively seeking employment, giving an unemployment rate of 22.9% for the Study Area in January, 1992.

While 1992 Statistics Canada information is not available for the Study Area, the Region (Southwest Region which includes Kings, Saint John and Charlotte counties) had an unemployment rate of 12.3% (based on a three month moving average) in January 1992. The provincial unemployment rate in January, 1992 was 13.5%.

Generalizing from the information supplied by respondents, 44.7% (±2-3%) of the population in this area between the ages of 15 and 65 years can be expected to be employed in a full-time job and 11.0% employed in a part-time job. Of those respondents employed in a full-time job (30 hours per week or more), 66% indicated that the job was a permanent job, as opposed to a temporary or seasonal job.

Although not exactly comparable, province-wide percentages (1986 Census Data) showed that 43% of the labour force worked on a full-time, full-year basis. Using the responses to questions on the Household Survey, 36% of the total sample (54.6% employed X 66% of those with their most recent job classified as permanent) were employed full-time in permanent positions in January, 1992.

The following section summarizes the employment-related activities of the respondents in this survey.

Work Place Experience

In this study, all participants were asked general questions about their work experience and specific information about their employment experience between 1986 and the time of the survey.

General Work Experience

The average number of years of work experience among the sample was 17.3 years, based on indications of at least some work experience in their life time (97% of respondents).

The patterns of work appeared relatively stable:

- 52% of those who have worked in the past five years have worked for one employer only;
- 25% have worked for two employers in a five-year period;
- 12% have worked for three employers in the past five years; and
- 11% have worked for more than three employers in the past five years.

In the past five years, 12% of the workforce claims to have moved to another community because of a work opportunity. The distance of the move was not asked in the survey. Within that group, 62% moved once.

Within the total sample, approximately 15% claimed to be a member of a union. Among those who were current participants in the labour force, 20% were members of a union.

Respondents worked, on average, 38.95 hours per week in his or her most recent or current job, and stayed with that job for an average of 7.8 years.

Eighty-three percent of those employed worked for someone and 17% were self-employed.

The following table summarizes respondents' reasons for leaving a job (within the last five years).

Table 9 Respondents' Reasons for Leaving a Job in Charlotte County			
		Labour Force Status	
	Ranking	LF	NILF
Laid-Off - Seasonal	1	26%	36%
Laid-Off - Lack of Work	2	24%	17%
Company Out of Business	3	16%	14%
Temporary, Term or Summer Position	4	14%	17%
Moved or Transferred	5	12%	5%
To Return to School	6	4%	23%
Got a Better, More Interesting Job	7*	11%	7%
Got a Better Job - Salary Too Low	7*	11%	6%
Health or Medical Reasons	8	5%	14%
Contract Position - Private Sector	9	6%	7%
Got a Better Job with More Hours	10	6%	4%
Family/Personal Responsibilities	12	2%	11%
Disliked Job/Poor Working Conditions	13	5%	4%
Wanted a Change	14	4%	3%
Government Program Ended	15	4%	1%
Got a Job Closer to Home	16*	4%	<1%
Problems/Conflicts with Employer	16*	3%	3%
Promotion to a New Position	17	3%	NA
Fired/Terminated	18*	2%	1%
Pregnancy	18*	1%	3%
Other, Miscellaneous	11	5%	4%
Retired	19	NA	4%

* Repeat numbers in Table 9 indicate a tie ranking.

Employment in the Study Area

As noted, each respondent in this survey was asked for detailed information about the last three jobs they had in the past five years, including any current jobs. Altogether, 898 respondents mentioned 1551 jobs. The following tables summarize all mentions reclassified into two-digit CCDO's.

Table 10 Total Employment (CCDO) For Study Area All Jobs - 1986 to Present

		Total Jobs	Percent of all Respondents
11	Management	54	6%
21	Science-Maths	37	4%
23	Social Sciences	21	2%
27	Teaching	65	7%
31	Health	68	8%
33	Arts	20	2%
41	Clerical	183	20%
51	Sales	111	12%
61	Services	232	26%
71	Farming	38	4%
73	Fishing	124	14%
77	Forestry	30	3%
82	Processing	273	30%
83	Machining	13	1%
85	Fabrication	60	7%
87	Construction	135	15%
91	Transportation	64	7%
93	Material Handling	23	3%
	Total Jobs	**1551**	
	Total Respondents	**898**	

Table 11	Total Employment: All Jobs By Gender		
		Males	Females
11	Management	7%	5%
21	Science-Math	7%	1%
23	Social Sciences	3%	2%
27	Teaching	5%	10%
31	Health	2%	14%
33	Arts	2%	2%
41	Clerical	6%	36%
51	Sales	9%	16%
61	Services	12%	41%
71	Farming	7%	<1%
73	Fishing	24%	3%
77	Forestry	6%	<1%
82	Processing	28%	33%
83	Machining	3%	NA
85	Fabrication	12%	<1%
87	Construction	27%	2%
91	Transportation	13%	<1%
93	Material Handling	4%	1%
	Total Jobs	**841**	**710**
	Total Respondents	**475**	**423**

The following tables provide a summary of the various industries which employed the respondents over the last five years. The industries were reclassified from 3-digit SIC's to major industry categories during data analysis.

Table 12 Source of Employment by Major Industry Group		
	# of Different Jobs	Percent
Agriculture	30	3%
Other Primary	178	20%
Manufacturing	372	42%
Construction	164	18%
Transportation et al	38	4%
Trade	197	22%
Finance	34	4%
Service	410	46%
Public Administration	116	13%
Total Jobs	**1539**	

Table 13 Source of Employment by Major Industry Group by Gender		
	Males	Females
Agriculture	6%	1%
Other Primary	33%	5%
Manufacturing	44%	39%
Construction	31%	4%
Transportation et al	6%	3%
Trade	18%	27%
Finance	4%	4%
Service	21%	74%
Public Administration	15%	11%
Total Jobs	**838**	**701**
Total Respondents	**476**	**418**

The data in Table 13 confirms a traditional pattern of employment: a larger percentage of jobs held by women are in the service and retail sectors and men are employed in construction, other primary industries and manufacturing.

The following table provides more information on employment within the different job categories.

Table 14 Jobs by Average Hours Per Week and Length of Employment

		Average Hrs Per Week(*)	Average Years in the positions
11	Management	44.78	9.75
21	Science-Maths	42.12	6.79
23	Social Sciences	42.66	7.60
27	Teaching	40.39	12.58
31	Health	32.78	7.63
33	Arts	44.75	6.33
41	Clerical	33.32	6.81
51	Sales	39.20	8.69
61	Services	34.77	5.40
71	Farming	39.82	4.67
73	Fishing	46.71	9.86
77	Forestry	44.47	6.76
82	Processing	38.16	7.93
83	Machining	44.00	5.40
85	Fabrication	42.90	6.19
87	Construction	43.68	7.28
91	Transportation	42.80	11.36
93	Material Handling	36.43	5.63
	Overall Average	**38.95**	**7.75**

All data in this table is based on the current or most recent job.

According to information collected, approximately 36% of the recent or current jobs filled by respondents were classified as temporary or seasonal and 90% were located within the Study Area. When asked about previous positions, 57% of the second mentions were seasonal or temporary and 79% were located within the Study Area; 57% of the third mentions were temporary or seasonal and 73% were located within the Study Area.

All respondents who had been employed at some time between 1986 and 1992 were asked about their level of satisfaction with different aspects of their current or most recent job. The following table summarizes the responses received.

Table 15 Worker Satisfaction

	Level of Satisfaction			
Satisfaction with...	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied
The pay received	40%	45%	8%	7%
With the opportunities for advancement	35%	44%	11%	10%
With job security	37%	38%	11%	14%
With the hours per week	56%	33%	7%	4%

This data is consistent with information collected through the employee focus groups. Generally speaking, focus group participants were satisfied with the position that they had. In some instances, although they wanted full-time employment or a permanent job, they indicated an acceptance of the seasonal nature of some jobs as well as the limited number of hours available for work in some positions. They also indicated that they wanted to stay in the region and, therefore, they had to accept what was available.

The following section summarizes the information collected on the unemployed worker in the Study Area.

The Unemployed Worker

All respondents who claimed to be *unemployed* - either seeking or not seeking employment were asked questions about their unemployment status.

Both those who indicated that they were seeking employment and those not seeking employment were asked if they would be willing to accept full- or part-time employment. Within this group:

- 56% would accept either full- or part-time employment;
- 36% would accept only full-time employment;
- 4% would accept only part-time employment; and
- 4% would not accept employment.

Those not actively seeking employment were asked why they were not looking for work. They provided the following responses:

- 52% said that they were waiting for recall;
- 14% indicated that there was no point in looking for work, there were no jobs available;
- 9% claimed that family responsibilities prevented them from seeking employment;
- 6% indicated that they had just been laid off and were not looking at the present time;
- 5% indicated that they were not interested in working;
- 3% indicated that they were in a training program;
- 3% claimed to have health or medical reasons for not seeking employment;
- 3% were on maternity leave;
- 3% said that they had no transportation to get to work;
- 2% said that they were waiting to start a job; and
- 2% said that they were not looking because they were receiving UI.

Seventy percent of those unemployed were looking for a job. The following information is based on responses from the 166 respondents who were actively seeking employment at the time of the survey.

On average, the person seeking employment at the time of this survey had been unemployed for 14.4 weeks.

Eighty-three percent of those unemployed and seeking employment indicated that it was very difficult to find a job and 12% indicated that it was somewhat difficult. However, 26% were very optimistic that they would find a job in the Study Area and 32% were somewhat optimistic. Forty-two percent were pessimistic about finding a job.

Eighty-two percent were looking for a job within the Study Area.

Unemployed respondents seeking employment claimed to be unemployed because:

- there were no jobs available (84%);
- they were waiting for recall (13%); or
- they lack an appropriate educational background or lacked appropriate job skills (3%).

Among those unemployed and seeking employment at the time of the survey:

- 63% had been employed within the last six months;
- 12% had been employed within the last 7 - 12 months; and
- 24% had last been employed before 1991.

When asked if they would be interested in moving to another area within New Brunswick to find employment, 68% indicated that they were not very or not at all interested in relocation. Thirty-two percent indicated that they would be somewhat or very interested.

This group of respondents was also asked if there was anything that limited their ability to relocate (move away from the Study Area):

- 38% indicated that there was no specific limitation on their ability to relocate;
- 26% indicated that their mobility was limited by their ownership of property;
- 19% were limited in relocation by their ties to families and their roots in the area;
- 7% were limited by the employment of their spouse; and
- 3% were limited by their lack of funds for relocation.

Again, the focus groups basically confirmed the information collected in this survey. It is interesting to note that the unemployed worker cited the lack of jobs as the primary reason for his/her unemployment while the employed worker was more likely to suggest that people were unemployed because they were lazy or unwilling to work. Most of those employed also suggested that there were jobs available but "no one wants to do those jobs."

No one in the focus groups indicated that relocation was a solution for the problem of unemployment in the Study Area. While some indicated a willingness to commute for employment, others suggested that they had returned to the Study Area where they could rely, if needed, on assistance from family and friends. Most did suggest that young people would have to relocate to find employment.

Unemployment Insurance

The focus groups' confirmation of the importance of Unemployment Insurance to people in the Study Area was expected, given the reach of UI payments among survey participants.

Using the sample of 1000 respondents as an estimator for the total population of the area, one can suggests that UI payments reached at least 34.3% ($\pm$ 2-3%) of the population at some point during 1991.

According to sample data, of the 344 people who received UI at some point in 1991:

- 76% lived in households in which one other person also received UI at some point in 1991;

- 7% lived in households in which at least two or more other people received UI at some point in 1991; and
- 17% lived in households in which they were the only person receiving UI.

On average, the person who received UI in 1991 did so for an average of 17.45 weeks. On average, a person who received UI and was employed for some time in 1991 worked an average of 28.33 weeks.

The focus groups conveyed a mixed impression of UI. In some instances it was seen as a disincentive for the workforce and in other instances it was seen as a positive economic factor in the Region. In all instances it was recognized as a fact of life in the Study Area - a way to maintain the people in the area.

When the focus group of unemployed workers were asked what they thought would happen if UI were no longer available, most saw the only option as social assistance or dependence on families - not as relocation. Those who were employed were more likely to suggest that the demise of UI would be a stimulus to attitude change and a greater interest in employment on the part of those unemployed. Such views were confirmed by participants in the Business Survey.

This study also explored the perceptions and interests of all participants in relation to past and future training interests. The information collected is presented in the following section.

Training

Introduction

The first point which must be made is that participants in this project, both those in groups and respondents in the survey, do not have what might be considered an 'orientation to training'. For the most part, participants indicated a concern with their day-to-day lives, not with future job opportunities which might result from additional training.

This attitude seems fairly consistent. Participants might consider training if it were in relation to a specific job opportunity, but in the absence of that, there was only a small percentage which seemed seriously interested in acquiring new skills in new areas.

In each group discussion, when people were asked what they might want to be in 10 years, or what they envisioned doing, in almost all instances they suggested that they would be doing the same type of work (or other activity) then as in 1992 (regardless of their current employment status). When asked if they had thought about the changing demands of the work place and the skills to be required in the future, it was clearly evident that few had given any thought to this.

In fairness to the employee sector, it must be noted that the Business Survey respondents expressed similar views. Few saw the need for new skill acquisition within their workforce and few indicated that they would be running a significantly different business in the future than today - if they were to be running a business at all, given the current economic conditions.

Because of the commonality of opinion, we suggest that future training interests or intentions expressed be viewed with a degree of scepticism. People may be 'interested', but their participation would be more likely to result if their employment were directly related to a particular program or another potential employment opportunity were reasonably assured.

If there is to be an increased emphasis on training in this area, such will have to coincide with an intensive awareness and education program to develop a more training-oriented perspective within the employee and employer groups. Such is discussed in the final sections of this report.

Past Experiences

Among all respondents, 32% indicated that they had participated in some type of training or education program within the past five years.

Among those who had participated in some type of training, 71% indicated that the training was related to the work that they were doing at the time.

Twenty-nine percent of participants indicated that they personally paid for their training while 32% indicated that their employer paid and 30% indicated that the government paid for the training. The balance of 9% indicated that their training was paid by a combination of resources.

The following table provides a listing of all the training in which respondents participated during the past five years.

Table 16 Training In the Past Five Years

	Number of Mentions		
Type of Training	ALL	LF	NILF
Intro Computers/Computer Program	61	55	6
First Aid/Safety	43	38	5
Management Training	31	29	2
Clerical/bookkeeping	28	23	5
University Degree/Credit	22	20	2
Professional Development Teachers	16	16	--
Fish. License-Certificate	15	13	2
Aquaculture Course/Diving	15	13	2
Mechanic	14	12	2
PD-Medical	12	12	--
GED	11	6	5
Language Training	10	8	2
Communication	10	10	--
Electrical	9	8	1
Navigational	9	8	1
Carpentry	6	4	2
Job Specific Machinery	6	6	--
Food and Beverage Industry	6	3	3
Welder	5	4	1
Cooking	5	3	2
Counselling	5	4	1
Canadian/Custom Law	4	4	--
Net Mending	4	4	--
Truck Driver	3	2	1
Dental Assistant	3	3	--
Geriatric Aide	3	3	--
Quality Control	3	2	1

Table 16 Training In the Past Five Years

	Number of Mentions		
Type of Training	ALL	LF	NILF
Construction	3	3	--
Taxation	2	2	--
Real Estate License	2	2	--
Social Work	2	2	--
Sales	2	2	--
Water Transport	2	2	--
Better Job Skills(non-specific)	1	1	--
Theology	1	1	--
Heavy Equipment	1	--	1
School Bus Driver	1	1	--
Music Lessons	1	--	1
Dress Making	1	1	--
Ship Building	1	1	--
Maintenance/Custodial	1	1	--
Waste Water	1	1	--
Material Handling	1	1	--
Architecture-Engineering	1	1	--
Total Training/Courses Mentioned	**374**	**327**	**47**

When those who had participated in training were asked what particular benefit or skill they had received from the training, most specifically related that the primary benefit was the same as the course they took. For example, those who participated in clerical training cited an increase in or enhancement of their skills, as did the person who took a diving course or the people who participated in professional development activities.

Future Training Interests

While the information on prior training experience gives a perspective on some of the topics of interest to the people in the Study Area, future training interests and intentions provide the information needed for planning.

All respondents in this survey were asked about their general interest in training - given their current skills and experience. Based on the information presented in the following tables, there is indication of interest. However, as the focus group discussions revealed, that interest seems to be more likely to result from a specific question being asked than from an innate interest in training to create greater employment possibilities.

Table 17 Interest in Future Training by Age Group

Level of Interest	Within Age Groups						
	Overall	15-18	19-24	25-34	35-44	45-54	55+
Very Interested	41%	41%	62%	55%	46%	33%	13%
Somewhat Interested	27%	41%	20%	28%	33%	28%	15%
Not Very Interested	6%	10%	8%	3%	4%	7%	7%
Not at All Interested	26%	8%	10%	14%	17%	32%	65%

As demonstrated in Table 17, the level of interest in training decreased as the age of the respondent increased.

Table 18 Interest in Future Training by Gender			
Level of Interest	Overall	Males	Females
Very Interested	41%	43%	40%
Somewhat Interested	27%	30%	24%
Not Very Interested	6%	6%	5%
Not at All Interested	26%	21%	31%

The differences between the levels of interest in training does vary in a statistically significant way between men and women. Women are less likely to be interested in training. However, there is a somewhat different perspective when this information is reviewed within the context of participation in the labour force, as demonstrated in the following table. In that analysis, the level of interest between men and women becomes more similar within subgroups.

Table 19 Interest in Future Training by Labour Force Status by Gender					
Level of Interest		Labour Force		NILF	
	Overall	Males	Females	Males	Females
Very Interested	41%	45%	46%	35%	27%
Somewhat Interested	27%	31%	25%	27%	21%
Not Very Interested	6%	5%	4%	9%	8%
Not at All Interested	26%	19%	25%	29%	44%

The following tables present the specific programs or courses in which respondents expressed a different level of interest and in relation to respondents' labour force status.

Table 20 Future Training Interests by Level of Interest

Type of Course or Program (CCDO'S)	# of Mentions Overall	Level of Interest Very Interested	Somewhat Interested	Not Very Interested
Computer-related training	118	73	41	4
Clerical and Related Occupations (411 413 414 415 416 417 419)	67	37	27	3
Managerial, Administrative (111 113 117)	62	39	23	--
Construction Trades (871 873 878 879)	60	37	21	2
Product Fabricating, Repairing (853 858 859)	50	24	22	4
Occupations in Medicine and Health (311 313 315 313)	40	33	6	1
University Degree Program - General	24	21	3	--
Protective Services Occupations (611 612 614 619)	24	14	9	1
Social Sciences and Related Fields (231 233 234 235 239)	20	11	9	--
Fishing-related (731 and general mention of fishing)	19	9	8	2
Elem and Secondary Teaching and related Occupations (273 279)	18	12	6	--
GED	17	10	6	1
Farm Management (713 718 719)	16	8	8	--
Occupations in Physical Sciences (211 213 214 215 216 218)	12	11	1	--
Air-Water Transport 911 915 917)	10	7	3	--
Fine and Commercial Art (331 335)	9	3	6	--
Language Training	7	5	2	--
Sales Occupations (513 517 519)	7	4	2	1

Table 20 Future Training Interests by Level of Interest

Type of Course or Program (CCDO'S)	# of Mentions Overall	Level of Interest Very Interested	Somewhat Interested	Not Very Interested
Forestry-Logging 751)	5	4	1	--
Electronic -Equipment (953 955)	4	4	--	--
Food/Beverage Fields (821 823 825)	3	3	--	--
Metal Shaping and Forming (833)	2	2	--	--
Material Handling (931)	2	--	2	--
Chemicals, Petro (816)	1	--	1	--
TOTALS	**597**	**371**	**207**	**19**

Table 21 Future Training Interests by Participation Status

Type of Course or Program (CCDO'S)	# of Mentions Overall	Participation Status LF	NILF
Computer-related training	118	95	23
Clerical and Related Occupations (411 413 414 415 416 417 419)	67	44	23
Managerial, Administrative (111 113 117)	62	53	9
Construction Trades (871 873 878 879)	60	48	12
Product Fabricating, Repairing (853 858 859)	50	43	7
Occupations in Medicine and Health (311 313 315 313)	40	33	7
University Degree Program - General	24	21	3

Table 21 Future Training Interests by Participation Status

Type of Course or Program (CCDO'S)	# of Mentions Overall	Participation Status LF	NILF
Protective Services Occupations (611 612 614 619)	24	14	10
Social Sciences and Related Fields (231 233 234 235 239)	20	18	2
Fishing-related (731 and general mention of fishing)	19	15	4
GED	18	10	8
Elem and Secondary Teaching and related Occupations (273 279)	18	13	5
Farm Management (713 718 719)	16	12	4
Occupations in Physical Sciences (211 213 214 215 216 218)	12	9	3
Air-Water Transport 911 915 917)	10	7	3
Fine and Commercial Art (331 335)	9	6	3
Language Training	7	6	1
Sales Occupations (513 517 519)	7	6	1
Forestry-Logging (751)	5	3	2
Electronic -Equipment (953 955)	4	3	1
Food/Beverage Fields (821 823 825)	3	3	--
Metal Shaping and Forming (833)	2	1	1
Material Handling (931)	2	2	--
Chemicals, Petro (816)	1	1	--
TOTALS	598	466	132

Table 22 Future Training Interests by Age

Type of Course or Program (CCDO'S)	Mentions Overall	Age Groups 15-19	20-24	25-34	35-44	45-54	55+
Computer-related training	118	2	8	32	43	22	11
Clerical and Related Occupations (411 413 414 415 416 417 419)	66	4	9	18	22	12	1
Managerial, Administrative (111 113 117)	62	--	6	16	23	13	4
Construction Trades (871 873 878 879)	60	6	5	21	18	7	3
Product Fabricating, Repairing (853 858 859)	50	9	3	17	18	4	3
Occupations in Medicine and Health (311 313 315 313)	40	2	1	21	9	6	1
University Degree Program - General	24	3	2	6	9	3	1
Protective Services Occupations (611 612 614 619)	24	--	2	6	8	4	4
Social Sciences and Related Fields (231 233 234 235 239)	20	1	--	6	7	5	1
Fishing-related (731 and general mention of fishing)	19	-	2	8	7	2	--
GED	18	1	3	4	5	3	2
Elem and Secondary Teaching and related Occupations (273 279)	18	2	1	7	4	3	1
Farm Management (713 718 719)	16	-	2	7	4	3	--
Occupations in Physical Sciences (211 213 214 215 216 218)	12	2	--	6	4	--	--
Air-Water Transport 911 915 917)	10	--	1	6	2	1	--
Fine and Commercial Art (331 335)	9	--	--	4	3	1	1
Language Training	7	--	--	1	5	0	1
Sales Occupations (513 517 519)	7	--	--	2	2	1	2
Forestry-Logging (751)	5	2	--	1	1	--	1

Table 22 Future Training Interests by Age

Type of Course or Program (CCDO'S)	Mentions Overall	Age Groups 15-19	20-24	25-34	35-44	45-54	55+
Electronic -Equipment (953 955)	4	--	2	--	2	--	--
Food/Beverage Fields (821 823 825)	3	--	--	2	1	--	--
Metal Shaping and Forming (833)	2	--	--	--	1	--	1
Material Handling (931)	2	--	--	--	1	--	1
Chemicals, Petro (816)	1	--	--	--	--	1	--
TOTALS	596	34	47	191	194	91	39

Mobility and Expectations of Workers in the Study Area

In looking at future development and business recruitment for a region, it is important that those having responsibility for such have a well-rounded perspective on the workforce. To that end, this study attempted to explore the perceptions that residents of the Study Area have about their community and their mobility, their value as a potential employee and their expectations in relation to wages.

Mobility of the Workers

The survey and the focus groups both confirm the commitment of people to their area of residence. People see a move from the area as a means of last resort - "if things get bad enough, I might have to move....but I want to stay here." This sentiment was expressed by most of the participants. However, most people, including younger participants, recognized that the Study Area did not offer a great deal in terms of employment for youth. Many suggested that most young people would move away from the area and in the McAdam focus group there seemed to be general agreement that the town had the potential to become a ghost town as no young people stayed in the community, older residents died and those needing employment moved away.

A strong sense of community was expressed in each of the focus groups. People stay in the area because they see it as home, as a place to be 'safe' and, in a sense to be protected. They view the area as calm and friendly and, in many instances, unchanging in the sense of community. It is also seen as an area where one can survive on less - something that cannot be done in a more urban area.

One of the younger participants saw the area as a place of refuge - where family and friends can be counted on and where one can raise a family in relative safety. Few participants expressed any interest in relocation. Most indicated that they thought that the economic conditions would improve - although they did not know what would bring about improvements. Most agreed that the survival of St. Stephen rested on the survival of the flakeboard plant - were that to experience severe financial difficulty, there would be little hope for the community. In McAdam, there was general agreement that major operations would not provide a future for the area. They had seen repeated failures in development efforts - including the most recent failure of the gypsum plant - and they expressed little belief that government investment would improve the economic future. The consensus in the group was that small business development and entrepreneurship represented the 'only hope' for the community . However, the group also joked about the entrepreneurship training program that was being offered at the time of this study - they felt that those being trained were the least likely to actually start a business.

Respondents in the survey expressed similar views on the Study Area. As presented elsewhere in this report, 68% of those currently unemployed indicated that they were not very or not at all interested in moving to another area. When asked if there was anything that limited their ability to move, 38% indicated that there was nothing in particular that limited relocation, 26% said that they were limited by their ownership of property, especially understandable in times of economic downturn, and 26% indicated that they were limited by their ties to family.

When all respondents were asked if they would be very, somewhat or not very likely to consider accepting a job in another area - if they needed a job and the one available required a move - 34% indicated that they would be very likely to move and accept that job. On the other hand, 66% indicated that they would be somewhat or not very likely to accept that job and move from the area. Those who were most

likely to accept the job were participants in the 16-24 age group.

When all respondents were asked what, more than anything else, makes them want to stay in the Charlotte County/McAdam area, 93% were able to provide a response to the question. Forty-four percent (44%) indicated that they wanted to stay in the area because of their strong personal ties or roots. Respondents were also likely to express reasons related to quality of life issues: the pace, the comfort of the place, the small town atmosphere, low crime rate and friendly people (altogether making up approximately 20% of responses). It is interesting to note that while property ownership is considered a hinderance to relocation, when the question about relocation was asked in a different context, property ownership was not considered as a reason for wanting to stay in the area.

The following tables summarize the overall perceptions of the area and perhaps provide the rationale for the desire of respondents to remain in the Charlotte County/McAdam area:

Table 23 Perceptions of the Study Area

How did respondents rate the Charlotte County /McAdam area as....	Excellent	Good	Only Fair	Poor
A place to live	34%	49%	13%	4%
A place to spend the rest of their lives	33%	41%	16%	10%
A place to work	14%	33%	29%	24%
A place for young people to find work	2%	7%	29%	62%
A place for respondents to find the types of work desired	16%	33%	27%	24%
A place with a good economic future	3%	20%	45%	32%

The overall impressions drawn from this table confirm the focus group impressions - that this area is one in which people want to live but not

necessarily one in which they can expect to find the type of work they want nor one in which young people can expect to find jobs. The respondents' perspective on the future economy of the region is also clouded.

The following information summarizes differences found within subgroups of the total sample:

- Differences between groups based on labour force participation status:
  - Non-participants had a less positive perception of the area as a place to live with 30% rating the area as an excellent place to live compared to 36% of labour force participants (significant at .009).
  - As one might expect given the fact that those who have given up the search for work are included in this group, non-participants (31%) were far more likely to give the area a poor rating as a place to work compared to those in the labour force (22%) and more likely (33%) to rate the area as poor in terms of being a place where one could find the type of work that they wanted to do (compared to 21% for those in the labour force). These differences were statistically significant. However, there were no differences in impressions about the area as a place for young people to find work - all agreed that the area offers limited employment for youth.
- Differences in overall perceptions were found when opinions expressed were analyzed for subgroups based on the age of the respondent.
  - The older the respondent, the greater the likelihood that s/he would rate the area as an excellent place to live and, conversely, the younger the respondent the greater the likelihood that s/he would rate the area as a poor place to live.
  - Respondents in the 19-24 age group had a less positive impression of the area as a place to work, as a place to find the type of work they wanted to do and as a place for young

people to work. This group was also far less likely than any other group to say that the area was an excellent place in which to spend the rest of their lives.

- The significant differences within subgroups based on the gender of respondents indicate that men were more likely (21%) than women (12%) to consider the area an excellent place to find the type of work they wanted to do. Women were far less likely (26%) than men (43%) to consider relocation to find employment.

Perceptions of Value as an Employee

The first observation that can be made is that people in this study were somewhat unable to define that which makes them a potentially valuable employee. Sixty percent of respondents mentioned attributes that were directly related to the specific jobs held in the past. The range of items mentioned corresponded to the types of occupations for the region indicated elsewhere in this report.

If respondents did not mention a specific workplace skill, they mentioned the following as skills that made them a valuable employee (percentages represent the percent of sample respondents providing a particular response):

- having good interpersonal/communications skills (13%)
- being a hard worker/a hard working person (6%)
- having a university education (4%)
- possessing managerial or supervisory skills (4%)
- having good common sense (3%)
- being prompt and/or reliable (2%)
- having a good attitude - wanting to work (2%)
- taking pride in a job well done (1%)

- having a high school education (1%)
- having a variety of work skills/experience (1%)
- having computer skills (1%).

The focus group discussions also confirmed that people wanted to work. Those who were unemployed appeared to want a job and in the McAdam area it was clear that people were willing to do whatever type of work they could find to 'get by'.

If a potential employer is looking for a workforce that is loyal to the area, willing to make a commitment and willing to work hard the Charlotte County area has an available labour force. However, one should also review the comments of the business community which offer a somewhat different perspective on the issue.

In addition to an exploration of the values and attitudes which are relevant in assessing a workforce, this study also asked people about their desired levels of wages. That information is summarized in the following section.

Wage Expectations

While respondents were not specifically asked about their current rate of pay (they were asked about household and personal income) they were asked the following question:

> *Given your lifestyle and skills, what hourly rate do you think would be a fair rate of pay for you in a full-time, permanent job?*

On average, participants considered $ 12.66 per hour as a fair rate of pay for a full-time, permanent job. Given the reported, average work week of 38.95 hours, this would equate to an annual income of $25,641.56.

The following tables provide a summary of participants' preferences for pay by gender, level of education, age group, labour force status, types of occupations within which respondents had work experience and major industrial sectors within which participants had worked. The reader will

note different estimates for overall means on Tables 24-29. This results when the subgroups are based on a different number of respondents within various subgroups. The reader should note that the wage expectations in relation to occupations and industries are based on the most recent job and industry within which respondents worked.

Table 24 Wage Expectation By Occupation

	Wage Expectation	Standard Deviation	# of Respondents
Management	17.78	9.33	32
Science-Math	15.73	5.05	21
Social Sciences	27.60	34.85	10
Teaching	17.72	5.25	33
Health	16.99	10.07	36
Arts	9.16	3.37	6
Clerical	10.72	3.30	94
Sales	11.40	5.55	38
Services	10.54	11.57	115
Farming	8.66	2.67	17
Fishing	14.28	7.29	61
Forestry	11.87	5.46	16
Processing	10.05	3.51	127
Machining	16.00	4.69	4
Fabrication	17.59	16.80	27
Construction	13.95	4.87	65
Transportation	11.88	2.84	35
Material Handling	13.12	4.85	12
Total	**12.79**	**8.86**	**750**

Table 25 Wage Expectation By Gender			
	Wage Expectation	Standard Deviation	# of Respondents
Males	14.75	10.54	421
Females	10.35	5.71	382
Total	**12.66**	**8.59**	803

Table 26 Wage Expectation By Education Level			
	Wage Expectation	Standard Deviation	# of Respondents
0 - 8 years	11.10	10.49	81
Some Secondary	10.62	9.38	143
High School - Grad	11.41	5.44	265
Com.Col/Voc. - No Diploma	17.33	19.68	15
Com. Col/Voc. - Grad	12.91	4.82	204
University - Without degree	16.06	8.06	30
University - Degree	21.03	15.76	63

Table 27 Wage Expectations Within Age Groups			
	Wage Expectation	S.D.	# of Respondents
15-19 years	$ 8.63	$ 8.67	47
20-24 years	9.72	3.17	60
25-34 years	12.24	8.69	226
35-44 years	13.76	10.01	218
45-54 years	14.07	10.13	135
55 - 64 years	12.99	6.41	105
65 years	12.50	5.45	11

Table 28 Wage Expectation By Industry			
	Wage Expectation	Standard Deviation	# of Respondents
Agriculture	$ 8.52	$ 3.19	11
Other Primary	13.83	6.15	91
Manufacturing	11.49	4.66	184
Construction	13.68	10.27	82
Trans. et al	15.43	5.96	22
Trade	11.08	10.74	77
Finance	15.96	7.68	14
Service	13.56	12.03	204
Public Admin	12.72	5.30	60
Within Groups - Overall	12.80	8.88	745

Table 29 Wage Expectations By Labour Force Participation			
	Wage Expectation	Standard Deviation	# of Respondents
In Labour Force	13.27	8.31	598
Not in Labour Force	10.87	10.12	204
Total	**12.66**	**8.86**	**802**

The information presented suggests that there is a somewhat different perception between the average wage that people consider a fair wage ($ 12.66) and the average hourly wage of $ 9.30 paid in the Study Area in January, 1992.

There are specific observations which can be made from the information presented:

- Women tend to have lower expectations in terms of a fair wage. We do suggest that this may be as a result of the reality of being paid less than men. We also note that the differences in perceptions between men and women follow a similar pattern within all age groups and at all education levels: while women with higher levels of education have higher expectations in terms of an hourly wage, they continue to have expectations which are 61% of wages expected by men with the same educational background.

- Overall, as the level of education increases, so does the expectation or requirements for an hourly wage.

- As one might expect, wage expectations or requirements are highest in what is considered as mid-point of a career or employment period (35-54).

- The variance between expectations of those with and without diplomas from community colleges may be a function of the small sample (15) and the large standard deviation for that group.

Summary of Findings from the Household Survey

Our observations on the responses and discussions from this research lead to the perception that many people in the area want work - they want the same type of work that has always been available. A large scale factory which paid a reasonable wage could find an ample supply of workers in the area. If such a place offered full-time, year-round employment, workers would be available and willing to work - if employers did not condone the cycle of temporary workers replaced by other temporary workers. However, under present conditions, such an opportunity is not available, people do not want to relocate and they accept what is available - in some instances that is employment, in other instances UI, social assistance or reliance on family members.

Few people involved in this study expressed high expectations in relation to employment. Respondents were prepared to make a trade-off between personal lifestyle choices and the level of economic reward. Realistically, many in the sample did not provide evidence of having the skills on which to base high expectations. Perhaps this lack of skill is closely linked to employment opportunities in the area: few jobs actually

offer extensive training leading to a progressive development of advanced skills, increasing levels of authority or responsibility or significant increases in salary/pay levels.

We did notice that there is a survival instinct that is similar to the skills required of an entrepreneur. People in this study are tenacious in their desire to maintain their lifestyles; they are creative and innovative in doing what needs to be done to survive. Some of their practices such as failure to report income earned in the Christmas wreath industry are questionable, if not illegal, but this particular practice is accepted as the norm in the community - "it's how people get the money to heat their homes and buy Christmas presents for the kids." Bartering is common in the region. Shopping in the US is considered a necessity to survive on the pay scale in the area - and it's an accepted practice for most of the people in the area. Some participants suggested that perhaps a return to a less complicated society would be good for people in the area - that difficult times may bring the community even closer and perhaps increase people's sense of independence.

We also noted that people in the community were as likely to voice criticism of UI as were employers but respondents were also far more likely to suggest that the end of UI would spell economic disaster for the area - in some instances resulting in suicide for those who could not find employment. People indicated that social assistance was the last step - the step which indicated that a person had given up and was no longer interested in work (referring to those who had to move from UI to social assistance).

While many recognized the importance of UI for the region, most also cited examples of how UI limits the motivation to work - that jobs go unfilled because people can receive more from UI than from employment. However, the participants who criticized people for not taking jobs that were available did not criticize the fact that people receiving UI receive cash payment for work and fail to report that income - to not accept "any" job is unacceptable; to "get around" the system is tolerable.

Training for skills updating or future opportunities is not a 'top-of-mind' issue. If training is directly related to work, it may be considered, if not, it would require more encouragement. Few participants indicated that they had given much thought to the potential for changing demands of the workplace. In fairness, we doubt that few, other than experts in

observing labour market demands, are giving serious thought to skills acquisition for the future - most are too busy with their current lives and work.

Participants recognized that the future for the area may not be optimistic. They see young people moving away, businesses closing and yet few really want to leave: perhaps the fear of the unknown is much greater than the economic and employment situation in the area.

The following material provides the summary of information on the Business Survey. The final section of this report will draw on the information from both studies and other relevant information in the presentation of recommendations from this research.

Research Findings - The Business Survey

The findings presented in this section result from contact with 390 private businesses in the Study Area. Contact was made through personal meetings with a sampling of the larger employers, through telephone contact with senior management or owners and through two focus groups with participants representing the overall business community. As with respondents in the Household Survey, respondents from the business community were cooperative and forthcoming with information and observations.

The following narrative provides a detailed summary of the information collected through the different research approaches employed in this study.

Economic Outlook

In understanding the results of any research project, it is best to be able to place those results within a context of events or influences which may have an impact on responses received. To that end, the initial interviews and telephone survey attempted to ascertain the perspective of the business community in relation to economic conditions. The following table provides a summary of responses received when respondents were asked for their impressions of the current and future state of the economy in the Study Area, along with questions which attempted to identify their perspective on the recent past and future revenue and staffing within their businesses.

As is evidenced in Table 30, participants were skeptical about the short term economic outlook but indicated a higher level of optimism about the next five years.

Table 30 Economic Outlook	
Economic Indicator	Percent of Businesses
Economic Outlook for Study Area for 1992	
Very Optimistic	7%
Somewhat Optimistic	34%
Not Very Optimistic	41%
Not at All Optimistic	18%
Economic Outlook for Study Area for the Next Five Years	
Very Optimistic	12%
Somewhat Optimistic	53%
Not Very Optimistic	26%
Not at All Optimistic	9%
Total Revenue Activity - 1991	
Increased	24%
Remained the Same	24%
Decreased	52%
Expected Revenue Activity-1992	
Increases	30%
Stay the Same	33%
Decreases	37%
Changes in the Number of Employees - 1991	
Increased	13%
Stayed the Same	62%
Decreased	25%
Changes in the Number of Employees Expected - 1992	
Increase	12%
Stay the Same	74%
Decrease	14%

Among those who were very optimistic about the economic outlook for the next five years:

- 29% indicated that the economy would improve - as a general statement;
- 18% claimed to be very optimistic because the aquaculture industry is relatively stable - it will continue to work for the region;

- 16% claimed that the economy had to get better - it could get no worse;
- 10% suggested that they could be optimistic because there are always new markets or new opportunities;
- 5% claimed that they were optimistic because they chose to look on the bright side of the problem;
- 5% suggested that the FTA would eventually bring rewards to the area; and
- 5% claimed to be very optimistic because the tourism industry is relatively stable.

Among those who were not very optimistic, many (31%) indicated that they were influenced by the generally poor economic outlook for the country and the province and 15% cited the number of business closures as a reason for their lack of optimism.

Among those with the most pessimistic outlook, 24% cited the generally poor economic outlook for the country and the province, 20% cited the negative effects from the increase in cross-border sales, 10% cited the number of business closures, 7% suggested that labour was unmotivated, 7% cited high taxes and 7% cited their loss of faith in governments as reasons for their pessimistic outlook.

There is a clear, if only marginally significant, link between respondents economic outlook and their projected business activity for 1992, as evidenced in the following table:

Table 31 **Level of Optimism for Charlotte County from 1992-1997**

Revenue Expectations-1992	Very Optimistic	Somewhat Optimistic	Not Very Optimistic	Not at all Optimistic
Increase	46%	31%	31%	24%
Staying the same	34%	36%	33%	12%
Decrease	20%	33%	36%	64%

Reading the information in Table 31, one can observe that 64% of the respondents who suggested that they were not at all optimistic about the economy of the Study Area over the next five years also indicated that they expected their total business revenue to decrease in 1992. Conversely, only 20% of those who were very optimistic about the economy expected their business revenues to decrease in 1992.

The following table shows the different levels of optimism found among owners in different types of industries:

Table 32: Level of Optimism Within Business Sectors

Type of Business	Level Of Optimism			
	Very	Somewhat	Not Very	Not At All
Primary Industries	16%	45%	33%	6%
Manufacturing	10%	69%	14%	7%
Construction	7%	43%	40%	10%
Transportation/Comm	16%	63%	11%	10%
Wholesale	17%	54%	25%	4%
Retail	9%	54%	21%	16%
Fin/Business Services	14%	46%	29%	11%
Education/Health	--	75%	25%	--
Other Services	16%	51%	26%	7%

Respondents in the construction, primary, retail and financial services sectors indicated lower levels of optimism about future economic conditions.

Of the 30% of businesses which suggest that overall revenues will increase in 1992, 26% were from the retail sector, 18% were in the primary sector and 12% were in manufacturing. Those predicting a decrease were from the retail sector, other services and construction.

Within the 390 firms contacted through the telephone survey, 13% indicated that they had an increase in the number of employees in 1991

and 25% indicated that the number of employees had decreased in 1991. Looking ahead for 1992, 12% of respondents expected an increase in their employees and 14% expected a decrease.

In reviewing the information collected, it is apparent that the business community is somewhat optimistic that the economic conditions will improve in the area within the next five years. The hopefulness was also expressed in the focus group discussions - but with a somewhat less optimistic overtone. Members of the business community recognize the problems of the area: the proximity to the border and the competition which results for area businesses; the taxation policies of the federal and provincial governments which are seen as disincentives for business growth, and tourism; the lack of available capital for business expansion (through what is seen as an especially cautious approach on the part of banks); the perceived damage to worker productivity produced through UI and social assistance payments and the overall state of the provincial economy in relation to the primary industries.

Certainly, much of the information in the following pages can demonstrate the pervasiveness of an attitude of caution among members of the business community in the Study Area.

Business Profile

Description of Business Study Participants

In addition to understanding the environment within which data are collected, it is important to understand the characteristics of the sample.

Table 33 provides a summary of the major industrial categories into which participating firms were categorized. The table also identifies the percentages of seasonal businesses within each major category.

Table 33: Classification of Employers		
Type of Business (Coded to 2 Digit SIC)	Total	% Seasonal
Primary Industries	16%	41%
Manufacturing	9%	18%
Construction	9%	36%
Transportation/Communication	6%	32%
Wholesale	8%	20%
Retail	24%	7%
Financial/Business Services	8%	--
Education/Health	3%	--
Other Services	17%	22%
	100%	N/A

This table indicates that 41% of the firms within the primary sector classified themselves as seasonal businesses and that no respondent representing either the financial or education sector classified their firm as seasonal.

Table 34 presents an overview of the firms which participated in this study.

As the table indicates, 24% of the firms in this study are involved in the export of products or services. Data revealed that firms involved in export are most likely found in the manufacturing, primary and wholesale sector -few other sectors are involved in any significant way in export.

Table 34 also shows that few owners of businesses (12%) live outside the area.

Table 34 Business Profile of Survey Respondents

Description	Percent of Businesses
Years In Business	
1 - 2 Years	6%
3 - 5 Years	22%
6 - 10 Years	24%
11 - 20 Years	26%
21+ Years	22%
Business Structure	
Sole Proprietorship	47%
Partnership	14%
Corporation	39%
Seasonality	
Seasonal Business	21%
Year-Round Operation	79%
Involved In Exports	
Yes	24%
No	76%
Number of Employees - 1991	
Single Owner	13%
1 -2 Employees	25%
3 - 5 Employees	23%
6 - 9 Employees	15%
10 - 24 Employees	16%
25+ Employees	8%
Residence of Business Owners	
Within the Communities	88%
Other areas within NB	5%
Outside the Province	7%
Total Before Tax Revenue	
$\leq$ $ 250,000	63%
$ 251 - 500,000	17%
$ 501 - 750,000	6%
$ 751,000 - 1,000,000	3%
More than $ 1,000,000	11%

Corporate Competitiveness

Certainly, with government initiatives, task forces and study groups, as well as the study completed by Michael Porter of Harvard University on Canadian competitiveness, there was an interest in determining the business community's perceptions of its competitiveness. Surprisingly, given the economic situation in the Study Area and the comments provided by many respondents about the impact of cross-border shopping and the Free Trade Agreement, the business community in the Study Area sees itself as very competitive, as demonstrated in the following tables:

Table 35 Self-Assessment of Firms' Competitiveness

Rating	Percent of Firms
Very Competitive	68%
Somewhat Competitive	29%
Not Very Competitive	3%

Table 36 Self-Rating On Competitiveness By Type of Business

Type of Business	Level Of Competitiveness		
	Very Competitive	Somewhat Competitive	Not Very Competitive
Primary Industries	59%	36%	5%
Manufacturing	73%	27%	--
Construction	67%	33%	--
Transportation/Comm	71%	25%	4%
Wholesale	59%	41%	--
Retail	70%	26%	4%
Financial/Bus Services	81%	19%	--
Education/Health	50%	38%	12%
Other Services	68%	28%	4%

Table 37 Competitiveness Rating by Years in Business and Number of Employees

Length of Time in Business	Competitiveness Rating		
	Very	Somewhat	Not Very
1 - 2 Years	68%	32%	--
3 - 5 Years	62%	32%	6%
6 - 10 Years	70%	27%	3%
11 - 20 Years	68%	30%	2%
21+ Years	70%	28%	2%
Number of Employees			
Single Owner	67%	27%	6%
1 - 2 Employees	53%	42%	5%
3 - 5 Employees	77%	21%	2%
6 - 9 Employees	70%	28%	2%
10 - 24 Employees	71%	29%	--
25+ Employees	76%	21%	3%

To determine the basis for competitiveness, each respondent was asked to identify their firm's strong and weak points as a business. Overall comments are summarized in Table 38 and Table 39.

Table 38 Strong Points of Business Firms in the Study Area	
Points Mentioned	Percent of Employers So Indicating
Quality of Service or Personnel	44%
Quality of Product	21%
Good Management Ability	8%
Pricing Practices	6%
Reputation	5%
Providing an Essential Product	3%
Lack of Other Competitors	3%
Size of Operations (Large)	2%
Employment of Local People	1%
Proximity to US Market	1%
Flexible Structure	1%
Marketing Efforts	<1%
Low Risk through Diversification	<1%
Convenient for Customers	<1%
Ownership of Plant Assets	<1%
Growth of Product (no line extensions)	<1%
Positive Profit Positions	<1%

Table 39 Weak Points of Business Firms in the Study Area	
Points Mentioned	Percent of Employers So Indicating
Inability to Compete	23%
Access to Markets	13%
Lack of Management and Marketing Skills	13%
Overall Economic Conditions	11%
Poor Product Quality	7%
Seasonality of Business	7%
Tax Policies Affecting Business	6%
Lack of Facilities/Lack of Ownership	5%
A/R Management - Cash Flow Demands	5%
Financing of Operation	5%
Staffing the Operation	4%

When those who rated themselves as somewhat or not very competitive were asked what they would have to do to make their businesses more competitive, they indicated a need for the following:

- better promotion or advertising (20%)
- being able to offer lower prices (13%)
- upgrading facilities and equipment (13%)
- expansion of facilities (12%)
- having management being prepared to work harder (8%)
- being able to increase overall sales volume (7%)
- offering a wider selection of products (6%)

- offering a wider selection of services (4%)
- develop better/wider markets (3%)
- having employees willing to work more efficiently (2%)
- have taxes reduced (2%)
- be able to move to a new location (2%)
- have government assistance with global marketing (1%)

An additional 4% suggested individual actions and 2% suggested that they were happy with their present level of competitiveness and had no need for further action.

Distribution of Employees within Business Classifications

The tables on the following pages provide an overview of the current number of positions within the different industries from the Study Area represented in this study.

Table 40 presents the average number of employees per firm within each sector, a number which indicates the number of employees in the Study Area employed by firms in this sample and the number of full and part-time positions within each sector. This information is based on 1991 staffing, as reported by respondents.

Table 41 (two pages) looks ahead to 1992 and provides the business owner/manager's perspective on the number of jobs they are planning to increase or decrease within their firms.

Table 40 Average Number of Employees Within Categories (Excludes Single Owner Businesses)

Classification	Totals			Full-Time Positions		Part-Time Positions	
	Number of Firms	Average # of Positions	Total Represented	Permanent	Seasonal	Permanent	Seasonal
Primary Industries	58	13.29	770.82	7.12	4.92	6.50	9.75
Manufacturing	30	25.93	777.90	28.05	6.77	6.16	4.66
Construction	30	5.33	159.90	3.00	4.15	15.00	2.66
Trans-Communication	23	13.43	308.89	8.08	4.88	30.00	5.66
Wholesale*	26	18.11	470.86	4.00	23.80	6.22	7.71
Retail	82	7.32	600.24	5.53	1.42	4.29	2.21
Finan-Bus Services	25	5.80	145.00	4.00	3.00	1.75	1.33
Education/Health	8	31.75	254.00	18.29	19.00	7.75	1.00
Other Services	55	11.67	641.85	5.15	11.18	2.36	4.60
Overall Averages	**337**	**12.25**	**4128.25**	**8.07**	**7.76**	**5.61**	**5.49**

* Connors' Brothers is excluded from mean calculations.

The averages across subgroups does not equal the average number of jobs because the total is a weighted average and the subgroup averages are based on different sample sizes.

Table 41 Planned Increases and Decreases in Positions Within Sectors

	Planned Changes	Number of Firms	Changes Within Sectors
Increases in Full-Time Positions			
Sector			
Primary	5	7.4	37
Manufacturing	4.88	9	43.9
Construction	2	1	2
Transportation	3	2	6
Wholesale	1.66	3	5
Retail	1.16	6	7
Finance	1	1	1
Health/Education	1.5	2	3
Other	1.66	3	5
Total Increase			109.90
Decreases in Full-Time Positions			
Primary	2.25	4	9
Manufacturing	5.75	4	23
Construction	2	6	12
Transportation	3	3	9
Wholesale	1	1	1
Retail	1.4	5	7
Finance	5.5	2	11
Health/Education	1	1	1
Other	3	6	18
Total Decrease			91
Net = Gain			**18.90**

Table 41 Planned Increases and Decreases in Positions Within Sectors			
	Planned Changes	Number of Firms	Changes Within Sectors
Increases in Part-Time Positions			
Sector			
Primary	1	2	2
Manufacturing	3.3	3	10
Construction	1	1	1
Transportation	3	2	6
Wholesale	2	1	2
Retail	1.5	6	9
Finance	1	2	2
Health/Education	1	1	1
Other	2	3	6
Total Increase			39
Decreases in Part-Time Positions			
Primary	1.5	2	3
Manufacturing	1.25	4	5
Construction	5.5	2	11
Transportation	20	1	20
Wholesale	2	3	6
Retail	1.75	4	7
Finance	1	1	1
Health/Education	-	-	-
Other	2.2	5	11
Total Decrease			64
Net = Loss			25

As demonstrated in Table 41, a net increase in full-time positions and a net decrease in part-time positions can be expected for Charlotte County in 1992 (based on responses from sample respondents).

Employment and Retention of Employees within Sample Firms

Educational Requirements for Employment

In order to understand the current qualifications for employment and anticipate future changes in demand, each participant was asked about the current and future educational requirements for employment. The following tables summarize responses received:

Table 42 Current Educational Attainment Required for Jobs in the Study Area

Level of Educational Attainment	Percent of Employers Demanding Such
Grade 8 or less	12%
Some Secondary	17%
High School Graduate	31%
Post Secondary	3%
Community College Graduate	5%
University Graduate	1%
Special License or Certificate	1%
Other	1%
No Educational Requirements	29%

Table 43 Future Educational Attainment Required for Jobs in the Study Area	
Level of Educational Attainment	Percent of Employers Demanding Such
Grade 8 or less	8%
Some Secondary	17%
High School Graduate	35%
Post Secondary	6%
Community College Graduate	7%
University Graduate	2%
Special License or Certificate	2%
Other	1%
No Educational Requirements	22%

The responses received lead one to suggest that employers within the Study Area anticipate few changes in the educational background demanded for employment. In a recent public address (as reported in the Daily Gleaner on Wednesday, March 25, 1992) the Co-Chairperson of the special committee on education in the province suggested that this will pose a problem in the future - that continuing acceptance of requirements which do not encourage additional education or training will not serve as an incentive for New Brunswickers to stay in school or obtain additional training in specific job related skills. Her comments suggest that the employers in the province must make an overall contribution to increasing the skills and educational level of residents by increasing their standards for employment. Such remarks seem most appropriate for the employers within the Study Area.

Recruitment of Employees

Among respondents, most indicated that they recruit and employ residents of the Study Area.

Each respondent was asked if their firm had any problems in finding and keeping employees. Overall, approximately 67% claimed to have no difficulty in finding people to staff their business operation. Analysis of responses revealed no significant differences between these firms and the 33% who claimed some level of difficulty in finding employees for their operation. For example, seasonal businesses did not report more difficulty in finding employees than year-round operations, and newer businesses did not report more difficulty than more established businesses. Table 44 summarizes the various levels of difficulty within different sectors:

Table 44 Difficulty in Finding New Employees by Sector

Sector	Difficulty In Finding New Employees
	Yes
Primary	22%
Manufacturing	31%
Construction	34%
Transportation	29%
Wholesale	39%
Retail	41%
Finance	15%
Education/Health	50%
Other Services	38%

Among those who claimed to have had difficulty in finding people to work in their businesses (33% of all respondents):

- 22% suggest that their difficulty arises from the fact that they cannot compete with the amount of money a person can receive from UI;

- 22% suggest that many are unwilling to work - that the amount of UI and social assistance payments have made potential employees lazy - they don't have to work;
- 22% suggest difficulty in finding people because of a shortage of the skills required for their business;
- 12% suggest that people have become lazy and that they are not motivated to work;
- 7% suggest that they have difficulty finding employees because the work they offer demands more than people are willing to provide (the work is too hard);
- 7% cannot find people who are willing to work at the minimum wage;
- 5% claim to have difficulty because they cannot guarantee full-time, permanent employment.

Turnover Rates

On average, the annual employee turnover rate in the Study Area, among firms participating in this study, was 11.07% in January, 1992. The following table provides a summary of average turnover rates within major industrial groupings:

Table 45 Annual Staff Turnover by Type of Firm		
Type Of Industry	Number of Firms	Annual Average Turnover Rate
Primary	57	15.38%
Manufacturing	30	8.9%
Construction	31	9.84%
Transportation	22	4.2%
Wholesale	26	12.73%
Retail	76	10.97%
Finance/Business Services	24	4.25%
Education and Health	8	16.62%
Other Services	53	12.79%

As is demonstrated in Table 45, there is a variation between sectors, but that variation is not statistically significant. The Finance/Business Services and Transport Sectors appear to be the most stable.

All survey participants were asked the following question:

> *What do you consider to be the single biggest problem in managing employees today - the biggest employee-related problem you have to face as a businessperson?*

The most common responses cited related to finding and retaining motivated employees (22%) or a statement that "I don't have any problems with employees today" (22%). Other comments were closely related to concerns about, or problems with, the motivation of employees such as: finding and keeping employees who can and want to work (11%) and finding people who want to work for more than 10 weeks (7%). Other problems were cited, as well. For example, 7% claimed that their major problem centred on trying to find the time for payroll and reporting functions or monitoring or adjusting to changes in government regulations. Pay was cited as a problem from two perspectives: some claimed that employees expected too much in wages (2%) while others had a problem with their inability to offer a fair wage to employees because of the income to their business (4%). Some

suggested that their major problem was being able to provide employment which offered job satisfaction (5%) while others claimed that they had a problem with employees who did not take pride in a job well-done (3%). Some employers claimed that their major problem centred on their inability to offer job stability (4%).

Based on responses to this question, it is apparent that employers in the area recognize many sides of the problem of employment, the types of work and rates of pay available in the Study Area.

The participants in the focus groups confirmed, in part, some of the points from the survey. However, they were far more vociferous concerning the impact of social assistance and UI on worker motivations. In the discussion groups, representatives of smaller businesses and seasonal operations appeared to have the greatest difficulty in finding employees. These firms also tended to offer wages closer to the minimum wage than others in the group.

All focus group participants expressed, to some degree, what they perceived to be the loss of initiative on the part of workers. Most expressed concern that employees wanted more than they were willing to give to employers. For example, some people seeking jobs expressed a desire to work only "regular" hours without the evening and weekend work some businesses required. Others talked about wage demands which far exceeded the ability of the business to pay. The moderator of the group did raise the issue of "reasonableness" of expectations of employers. It was obvious that employers felt that current and potential employees were unaware of the low profit margins in some businesses and unaware of the low wages being taken by owners of these businesses. In both instances, it appeared that misinformation or a lack of understanding was apparent for both employers and employees.

When the moderator asked employers what they believed was a reasonable wage for themselves, were they looking for a job at the time of the group, most employers suggested about the same range of pay rates as did employees in the household survey. However, the employers, in most instances, claimed to be unable to pay the average wage considered fair and reasonable by area residents. Such responses further cloud the situation: employers know what amount of money they would need and they realize that others would require the same amount - but they are not able or willing to pay that rate.

Within the focus groups, some employers who paid higher rates of pay seemed more positive about the potential labour pool. In one instance, an employer had a waiting list and low turnover and stressed the need for training within the business. However, the concerns about the quality of potential employees was likely to be negative. This was also confirmed in some of the personal interviews completed for this project. In one interview, for instance, the employer had a entry-level management position which had been vacant for several months because he felt that he had no applicants who had been aggressive or really positive about the potential employment and advancement opportunity.

In the focus groups, the moderator called the employers' attention to the fact that their concerns about UI and social assistance abuse might also be the result of their actions as much as the actions of residents of the area. For example, complaints were not followed-up by employers, violations were not reported and as one participant indicated, in some businesses, higher wages were paid for some positions to ensure sufficient UI to give the employees a fair unemployment income in winter months so that they would be available for work in the spring. The employers were likely to state that they did not have the time to follow-up on complaints, that the bureaucracy made the process too difficult and too time consuming and that previous action had resulted in enough inaction so that future efforts were no longer worth the reward. The issue about paying more to ensure a seasonal work force was recognized as a fact of doing business in the area.

In general, it appears that employees and employers are, in reality, quite similar. Both have higher expectations than the other can meet; both, in many instances are resistant to change and both have strong attachments to the Study Area. Therefore, it is apparent that efforts to bring about a change in either attitudes or behaviour should be directed at each group, equally.

Training within Sample Firms

Current Training

To begin an exploration of employee training among firms in this sample, each respondent was asked if they provided any type of training for their employees. Two hundred and twenty-eight of the firms in this study (58%) indicated that they offered training.

Table 46 demonstrates the percent of firms within each major sector who were offering training to their employees.

Table 46 Participation in Training by Sector

Sector	Percent Offering Training
All Sectors	58%
Primary Industries	56%
Manufacturing	68%
Construction	53%
Transportation	32%
Wholesale	50%
Retail	62%
Finance/Business Services	74%
Health and Education	80%
Other Services	57%

Table 47 and Table 48 summarize the different types of training and the types of people used to provide training to businesses in the Study Area.

Table 47 Types of Training Offered in Participating Firms			
Type of Training Provided	Number of Firms	Percent of Training (n=228)	Percent Overall (n=391)
OJT	224	98%	57%
Apprenticeship Programs	61	27%	16%
Marketing and Sales Training	62	27%	16%
Supervisory Training	71	31%	18%
Personnel Development	54	24%	14%
Financial Management	23	10%	6%
Clerical Training	65	29%	17%
Computer Training	67	29%	17%
Other Training	40	18%	10%

Table 48 Ways in Which Training Is Provided		
Training Suppliers	Number of Firms Using Suppliers	Used by % of firms
Staff within the Company	150	66%
Staff from Other Firms	36	16%
Community Colleges	66	29%
Private Consultants	31	14%
Training Institutes	70	31%
Other	20	9%

Among those firms offering training (228), 148 provided a specific estimate of the percentage of employees who were involved in some type of training in a typical year. Among these firms, 49% of their employees, on average, were involved in training in an average year. Table 49 provides an estimate of the average level of involvement of all employees (in an average year) within these 148 firms by sector.

Table 49 Average Percentage of Employees Participating in Training by Sector (n=148)	
Sector	Participation
All Sectors	49%
Primary Industries	50%
Manufacturing	56%
Construction	44%
Transportation	44%
Wholesale	42%
Retail	50%
Finance/Business Services	63%
Health and Education	46%
Other Services	42%

Each survey participant who indicated that their firm offered some type of training was asked who had paid for that training. Responses are summarized in Table 50.

Table 50 Source of Funds for Training in the Study Area	
Who Pays For Training?	Percent
The Company Alone	72%
Company and Employees	3%
Government-Sponsored	9%
Company and Government Sponsorship	14%
Other or Combination	2%

Of the 228 firms which provided training, 85 provided a specific dollar figure when asked how much their company had spent on employee training in 1991. On average, these 85 companies claimed to have spent

a total of $ 6718.47 on training in 1991. Table 51 provides a summary of average expenditures per firm within the different industrial sectors.

Table 51 Average Annual Expenditures for Training in 1991 (n=85)

Sector	Number of Firms	$ Spent
All Sectors	85	$ 6,718
Primary Industries	5	12,460
Manufacturing	8	14,375
Construction	6	1,816
Transportation	2	6,000
Wholesale	6	5,416
Retail	20	2,106
Finance/Business	14	6,350
Health/Education	6	3,966
Other Services	18	10,197

To further explore the allocation of training resources, in the process of analysis the per employee training expenditure was calculated for each of the 85 firms providing a specific dollar figure for training. Table 52 provides a summary of the results of this calculation.

Table 52	Average Annual Per Capita Expenditures for Training For Employees in 1991 (n=85)	
Sector	Number of Firms	$ Spent per Employee
All Sectors	85	$ 493.21
Primary Industries	5	872.21
Manufacturing	8	258.59
Construction	6	615.70
Transportation	2	180.10
Wholesale	6	694.26
Retail	20	329.61
Finance/Business	14	594.73
Health/Education	6	415.13
Other Services	18	551.59

Given the number of respondents who indicated that training is provided, the way in which training was delivered in 1991 and the amount of money spent (or not spent), it appears logical to conclude that most training might also be classified as orientation to the job (learning the skills required of a specific job) more than training in the sense of expanding overall skills and acquiring additional levels of expertise - perhaps beyond the scope of the current job. This observation was confirmed in the focus group discussions when the moderator attempted to discuss training as a means for employees to learn to acquire different levels of responsibility and decision-making - to learn to act more independently. The consensus from that discussion was that employers needed to train employees for a particular/specific job - they needed people to do a particular task and they did not have the time to train in more general areas, in areas more related to employee development.

Future Training Needs

Each respondent was asked if they thought that future employees of their firms would need any special training (implying training different

from what might have been available in 1991). Overall, 32% indicated that their employees would need special training in the future. The following table identifies the indications of future needs within various sectors:

Table 53 Perceived Need for Special Training in the Future within Sectors

Sector	Percent of Firms within Sector
All Sectors	32%
Primary Industries	26%
Manufacturing	38%
Construction	28%
Transportation	20%
Wholesale	23%
Retail	38%
Finance/Business	45%
Health/Education	50%
Other Services	22%

Table 54 provides a summary of responses provided by representatives of the 122 firms who indicated a need for special training for employees in the future.

Table 54 Training Which Will Be Needed In The Future

Training Area	Number of Mentions
Computer Training	36
Job-specific upgrading	20
Auto Mechanics	14
Managerial/Supervisory Training	9
Customer Service	8
Sales Training	7
Marketing	7
Electronics	6
Cooking and Baking	5
Accounting	3
Clerical-Word Processing	3
Transport Driving	3
Safety Courses	3
Updating on Trends	3
Medicine and Health	2
Insurance	2
Dangerous Goods Handling	2
Diving Courses	2
Environmental Issues	2
Net Mending	2
Agriculture	2
Veterinary Medicine	1

Table 54 Training Which Will Be Needed In The Future	
Training Area	Number of Mentions
General Upgrading	1
Update: Legislation and Regulations	1
First Aid/CPR	1
Floor Covering Installation	1
Refrigeration	1
Carpentry	1
Meat Cutting	1
Floral Design	1
Maintenance	1
Heating/Furnace Repair	1
Photography	1
Ship Navigation	1
Geographic Information Systems	1
Janitorial	1
Metal Working	1
Total Mentions	**157**

As was found in responses from the household survey, future training needs are primarily tied to current occupations. It appears that most firms do not expect significant changes in the training requirements for jobs through the end of this decade.

As we observed in the Household Survey, the lack of a futuristic perspective is understood if one considers the demands on people today. As was often stated in the focus groups, business people in the Study Area are having a difficult time managing today because of the current economic situation and what they perceive to be the negative effects of the Free Trade Agreement, the GST and cross-border shopping. When, for example, survey respondents were asked what they saw as the biggest challenge facing them as businesspeople in the 1990's, the largest percentage (28%) claimed that their major challenge was remaining solvent in the current economic situation. The following table provides a

summary of what business respondents saw as the major challenge facing them in the 1990's.

Table 55 Business Challenges for the 1990's

Major Challenge	Percent Indicating
Staying Solvent - Managing in Difficult Economic Times	28%
Staying Competitive (Including meeting competition from the US)	23%
Finding and Keeping Motivated and Trained Employees	13%
Developing Markets and Opportunities	11%
Keeping up with Changes in Legislation and Regulations	7%
Being able to afford the cost of regulation and legislation (including CPP, WC and UI)	6%
Providing Permanent/good work for employees	4%
Keeping up with the paperwork	2%
Keeping government out of the private sector	1%
Other individual responses	5%

As indicated by the responses, businesspeople in the Study Area were feeling the pressures of the economic times in January, 1992, and their indications of future challenges suggest that they felt that the pressure would not decline in the immediate future. Given that economic survival and meeting competition were such dominant concerns, it is not surprising that businesspeople are not more futuristic in their thinking about the potential for change and the different types of demands which may be placed on them in the future.

Business Growth in the Study Area

While not primarily a study concerned with economic development, in planning for the future needs of the workforce, it was essential that this study explore the areas in which economic growth is possible. To that end, each business respondent was asked for his/her impressions of businesses or business areas which had growth potential. While several areas were mentioned, it is obvious from the following table that aquaculture and tourism are perceived to be the primary growth areas:

Table 56 Respondents' Perceptions of Business Growth Areas

Areas of Business with Growth Potential	Number of Mentions
Fisheries and Aquaculture	147
Tourism	73
Services (General)	19
Forestry	16
Bayside Port	10
Flakeboard Plant	9
Construction	6
Retailing	6
Woodworking (General)	5
Health Care	5
Farming	5
Lumber/Saw Mills	4
High Tech/Computing	4
Ganong's	3
Manufacturing (General)	3

In addition to these areas one or two respondents mentioned a variety of industries or current businesses such as the nuclear industry, the veneer or gypsum plants, the communications or telemarketing fields, Connor's Brothers, small business in general or crafts and home-based industries.

Tourism and aquaculture industries were also described as the ones with major potential by focus group participants and in some of the initial interviews with area business leaders. However, growth predictions are not unlimited. Each area has potential limitations or barriers which participants identified. For example, tourism is limited by the season, the lack of promotion for the region and the province, the lack of awareness of the area by potential visitors from key markets and the lack of money for expansion of existing resources. Many indicated that the area has significant potential, especially in its overall appeal to the older tourist who may be seeking a certain peacefulness and natural beauty. Several noted the disappointment of area operators with the failed efforts to promote the Quoddy Loop and the lack of ability of New Brunswick and Maine to fund a promotional effort. Concern was also expressed about the length of time which will be required for economic recovery from the current recession which would be essential for further development of the tourism industry.

Many also expressed concern about the current taxation policies (especially the consumption taxes) which they believe serve as inhibitors to the development of the tourism industry. They also noted their concern with the high value of the Canadian dollar which they saw as another inhibitor of tourism development and growth.

While the aquaculture industry was clearly identified as a growth area, discussion on the growth potential also raised points of concern. For example, a participant in that industry cited the problems with development and entry as a result of increasing regulations and bureaucratic difficulties. Others noted the increasing competition on a world-wide basis. Strong points for growth focused on access to the US market and the quality of the NB products. The industry also has the potential for spin-off industries in the area and was seen as an industry that could upgrade the skill demands of the local labour pool.

The groups, as a whole, also seemed to believe that growth in the Study Area would not result from mega projects or major investments by governments. Most saw the future in terms of small business

development, even though they recognized the difficulties of encouraging small business starts under current economic conditions.

Barriers to Economic Growth

When survey respondents were asked to identify the barriers to economic development for the region, they suggested five primary areas:

- government policies (56%)
- population characteristics and attitudes (15%)
- access to markets and capital (11%)
- structure of the business environment (9%)
- economic conditions (7%)

Responses categorized as government policies included comments on the following: the Free Trade Agreement resulting in increased cross border shopping and more direct competition from the US, federal and provincial taxation policies, the lack or quality of government investment in the area, the lack of government interest in the economic well-being of the area, the lack of government planning and the lack of willingness of government to listen to the concerns of people in the area.

Responses categorized as population characteristics or attitudes included references to the lack of trained workers, poor attitudes within the work force, a population that is too negative or uncooperative, the lack of population growth and the UI-dependency of the work force.

Responses categorized as access to markets or capital included references to transportation problems, lack of internal and external investment and the need for market development activities.

Responses related to the structure of the business environment included reference to the need for diversification of the local economy, the need for business people to be more independent and the need for greater business development.

Perhaps not unexpectedly, respondents in the survey and the focus groups saw government actions or inactions as the major barrier to economic development of the area. The discussions and the responses do not suggest that the business community in the area is, in general, an entrepreneurial community. Responses also do not suggest that the business community sees itself as a controlling force in the local economy - its actions or growth are seen to be controlled, regulated or otherwise affected by the different levels of government.

Following the identification of barriers to growth, each respondent was asked what action was needed to ensure a solid economic future for the region and who was going to get that action accomplished. We call attention to the fact that each of these questions was asked in an open format - no suggested answers or choices were given to survey respondents.

As should be expected, given the identification of the barriers to economic development, most respondents suggested that the responsibility for actions which are necessary to ensure a solid economic future rest with governments as well. Among all respondents:

- 27% suggested an action which should be completed through a combined effort of the federal and provincial governments;
- 15% suggested a cooperative action by various levels of government and local members of the business community;
- 13% suggested an action to be taken by the federal government;
- 11% suggested an action for government, in general;
- 10% suggested an action for the provincial government;
- 10% suggested an action for the Canadian people;
- 6% suggested an action for the private sector;
- 6% suggested an action which should be done, but suggested that no one would accomplish it;

- 1% suggested an action for municipal governments or agencies; and
- 1% suggested an action to be taken by banks.

Actions suggested for the combination of the federal and provincial government include:

- reduction of taxes
- development or attraction of new businesses
- creation of jobs
- provide a better educational system
- increase requirements for UI eligibility
- encourage small business development
- locate large industry in the area

Actions suggested for a cooperative effort between governments and employers include:

- development and attraction of new business
- create a more competitive environment with US
- encourage small business development
- lower the value of the dollar
- create a better education system
- provide training in tourism
- reduce the involvement of government in business
- provide better leadership in government
- collaborate on solutions for the area

Actions suggested for the federal government include:

- creation of jobs
- reduction of taxes
- helping to create a more competitive environment with the US
- lowering tax on cigarettes and gasoline
- reforming UI
- reducing involvement in business

Specific actions suggested for the government in general include:

- developing or attracting new business
- reducing taxes
- creating jobs
- lowering taxes on cigarettes and gasoline
- reducing government involvement in business

Specific actions suggested for the provincial government include:

- better marketing and promotional efforts
- reducing taxes
- being more responsive to people - listen to people
- developing or attracting new business
- creating jobs

- improving the education system
- strengthening UI requirements

Actions suggested for Canadians include:

- spending their money in Canada
- changing attitudes (toward work and towards the country)
- being supportive of small business

Actions suggested for the private sector include:

- investment in or encouragement of large business development
- support for less government in business
- improving business management practices
- increasing secondary processing
- providing more training
- expanding markets

Municipal governments and agencies should:

- recruit large business
- control cross-border shopping
- invest in new business ventures

Banks should:

- invest government dollars (loan guarantees) wisely
- change the banking system (to be more supportive of business)

Some participants suggested actions which they believed no one would actually do:

- reduce taxes (general reference)
- eliminate the GST (specific reference)
- encourage work programs for UI recipients
- reduce peoples' dependency on government
- reduce government involvement in business

As is evident in these comments, there was a consistency in the suggestions for actions - simply a difference in the assignment of responsibility for actions. Fifty-seven per cent of those who made a suggestion mentioned the following actions to ensure a solid economic base for the area:

- a reduction in taxes (15%)
- development/attraction of new business (10%)
- job creation (9%)
- creation of a better environment for competition with the US (6%)
- reduction in government involvement in business (5%)
- better government leadership (4%)
- improvement of the education system (4%)
- increased requirements for UI eligibility (4%)

Given the assignment of responsibility for economic development to the different levels of government, it is appropriate that each participant in this survey was asked to evaluate the performance of government and

the private sector in economic development activities. The following table summarizes the responses received.

Table 57 Satisfaction with Performance of Government/Groups Involved in Economic Development

	How Satisfied Were Respondents			
Group/Level of Government	Very	Somewhat	Not Very	Not at All
The Business Community	9%	57%	24%	10%
The Federal Government	3%	26%	39%	32%
The Provincial Government	6%	43%	29%	22%
Municipal Governments	10%	52%	25%	13%
Local Boards and Development Commissions	12%	56%	18%	14%

In reviewing these performance ratings, one can see that the business community rates the efforts of local governments, commissions and the business community higher than the performance of the provincial or federal government.

It is interesting that the business community gives lower ratings to the provincial and federal government while assigning them major responsibilities for activities related to the economic future of the region.

Summary of Findings from the Business Survey

This part of the total research effort was designed to provide a future-oriented perspective on the attitudes, intentions and behaviours of the business community in the Study Area. The following points summarize the information collected through personal interviews, a telephone survey and focus groups:

- The business community, in general, is cautiously optimistic about the economic future of the region. Many implied that it would be difficult to imagine more difficult times than those of 1991.

- The business community sees itself as being as competitive as it can be. Comments suggest that they also believe that they are not operating on a level playing field with their US counterparts as a result of government action in the areas of taxation and regulation.

- There appears to be an increase in the number of positions available within sample firms in 1992. The change appears to be based on an increase in the number of full time positions and a decrease in the number of part-time positions.

- Employers anticipated little change in the type of employee that might be needed in the future - they indicated only a minor change in the level of educational attainment which will be demanded in the future and little change in the skills required (based on their perspective on future training needs).

- Most employers hire locally and claim to have little difficulty in staffing their operations. However, the smaller the business and the lower the rate of pay, the more difficult the staffing of an operation.

- Comments suggest universal agreement on the need to reform current practices related to UI. Employers believe that the current system serves as a disincentive for work - that it contributes to the growth of a labour pool which lacks motivation and not interested in year-round, full-time employment. At the same time, some participants in this survey recognize that they cannot provide full-time employment and need UI to ensure the availability of a stable work force for their seasonal operations.

- Training was provided by the majority of firms in this study. The training provided was primarily an on-site process delivered by in-house staff and specifically related to learning the skills required for a particular job. There did not appear to be a great deal of emphasis placed on employee development.

- Future training needs were undefined other than a general knowledge that employers will have to provide skills upgrading in relation to specific jobs and increased computing skills for their employees.

- The major problems facing business in the Study Area in January, 1992 involved trying to remain solvent and trying to remain competitive.

- The business community suggested that aquaculture and tourism represent the future growth areas.

- The major barriers to economic growth in the region were identified as government policies, population characteristics, access, the structure of the business community and overall economic conditions.

- The business community seemed to assign the responsibility for economic development of the region to different levels of government (sometimes in conjunction with the business community). A key task for governments is the reduction in the level of taxation applied to business and in the rate of tax charged to consumers.

- When asked about their level of satisfaction with current economic development efforts by different groups and governments, respondents indicated higher levels of satisfaction with local organizations and governments than with the federal or provincial governments.

Charlotte County and the Acadian Peninsula

In January, 1991, a study was completed on the Acadian Peninsula which addressed many of the same issues covered in this project for the Charlotte County/McAdam area. The following material provides a summary of points of commonality and divergence for the two areas.

- **The Business Community**

In both areas jobs demanding highly technical skills or offering significant opportunities for advancement are quite limited. Neither study suggests a significant change in the type of work available through the remainder of the 1990's.

The business communities in both areas are skeptical about the economic prospects for their region. Both business communities suggest that it would be difficult to imagine a worsening of economic conditions.

While the Acadian Study suggested significant growth in employment, it did not address the issue of potential job losses. The Charlotte County Study suggests only a limited increase in the number of jobs available within participating businesses and takes the potential job losses into account in these projections.

Neither business community demonstrated a strong commitment to employee training - either in current practices or future interests.

Both communities saw the responsibility for economic development as a shared responsibility and both expressed dissatisfaction with the economic development activities of the federal and provincial governments. Neither saw the business community as the driving force in economic development efforts.

Both business communities cited problems related to attitudes and work-related behaviours of the labour force. However, both were also satisfied, in general, with the performance of their employees.

Given the recent crisis in the fishing industry, and, recognizing that aquaculture is more prominent in Charlotte County, it is interesting that the business communities in both areas see the fishing industry as a key factor in the economic future of the region.

Both business communities see similar barriers to economic development: lack of resources, lack of commitment on the part of government and lack of access to markets.

- **The Labour Force**

Both studies demonstrated that the labour force in each area is content with their lives, firmly tied to the area and uninterested in relocation.

Residents of both areas appeared to have given little thought to the future in terms of potential changes in demand for work or changes in the skill level demanded. In fact, this could be expected, given that the business community in both areas appeared to give little thought to issues such as these, as well.

Respondents in both surveys reported similar work patterns and participation rate. Interestingly, both reported high levels of satisfaction with their work, although both acknowledged the shortage of work for those unemployed. Those unemployed in each area saw the lack of jobs as the primary reason for their unemployment.

The labour force in the Charlotte County area had a higher rate of participation in training programs although the percentage of employers who offered training did not appear to vary significantly between regions.

- **UI**

The studies for both areas demonstrate the reliance on UI by both employees and employers. Both also identify the demand for changes in the current system; however, it appears that respondents in neither area had actually thought about the economic impact were UI not a resource for the regions.

In essence, these two studies have demonstrated remarkably similar patterns in two different areas of the province.

Recommendations From the Research

Research recommendations are based on the experience, observation and interpretation of information by the staff of the research firm. In a sense, they represent an opinion and, as such, are not considered as objective information. Within this context, Baseline makes the following recommendations to those responsible for planning for the long-term future of the Study Area.

People Development

The attitudes and behaviours demonstrated in this research effort suggest a somewhat complacent population which is essentially satisfied with their lifestyle and which has limited expectations for a significant improvement in the economic conditions of the region. In many instances, people have accepted seasonal or term employment and prefer that option to the thought of giving up their lifestyles in order to seek full-year employment or greater economic return elsewhere. Regardless of the current level of satisfaction, few indicate that there is great hope for the ability of the region to provide a positive economic opportunity for future generations.

If, in the current state of change in the world, the Charlotte County area has the option to remain static, there is not a need for action. However, we suggest that inaction is not affordable for New Brunswick or for Canada. At the same type, we recognize that there are no short-term solutions for the Study Area.

If the region is to move to more independence and self-reliance, the people of the area will have to acquire the needed orientation and skills. If people are to take control of their lives and have higher expectations, such will have to be encouraged. We suggest that assistance and programs which provide part-year work are short-term solutions - although they have been used to sustain the population of the Study Area for years.

If attitudes are to change, they will only change over time. Certainly, the provincial government recognizes the need to change attitudes if the concept of self-reliance is to become applicable to New Brunswick. If change does not take place, self-reliance for New Brunswickers refers to the ability to survive the time between a part-year job and receipt of UI.

Education and Training

We suggest the need for the improvement of the education curriculum to support and develop an orientation towards change, risk taking and increased expectations. If people are to have more control and more autonomy, they have to come to demand that and be willing to assume responsibility for their lives. If people continue to believe that all will continue in the future as it has been in the past, there is no incentive for change. The educational system provides the opportunity to reach an entire segment of the population. We suggest that governments have, in many ways, encouraged the population's dependency on government. It is now time for those governments to encourage self-reliance. A revised approach to education and the orientation that people receive is a crucial step in that process.

If people become more oriented to change, they may be more likely to consider the need for the acquisition of skills and a more career-oriented perspective on their lives. When work becomes only a series of jobs with limited opportunity for advancement or improvement, there is little incentive for personal improvement. If attitudes can be changed and, at the same time, meaningful training opportunities provided, one can hope that change will result.

We suggest that public education is also essential. The confrontation with the economic realities of today is a part of the public education process, but a more positive, and more time consuming approach rests in efforts to make New Brunswickers and residents of the Study Area more aware of the uncertainty of the future. In this study, many people had not considered the possibility of a loss of UI or a significant structural change in the economy of the province. However, those are realities or potential realities. A positive economic future for this province rests on the ability of its business community to diversify and the ability of its

work force to provide the resources necessary for that diversification. The people of this province have to face that reality.

Employment and Changes in UI

The people of the region also simply need to work. While we recognize the need for a social safety net, as long as people have the opportunity to refuse or avoid work when jobs are available, they are being allowed to ignore future realities. While we recognize that work is not the answer for all social problems, we also recognize that the lack of work is a major contributor to longer term social problems. The lack of work for the population at large is a significant problem; the lack of work for those entering the workforce is a critical problem. We recommend that efforts be accelerated which will provide jobs or training opportunities for people receiving UI and those receiving Income Assistance who are able to work. We recommend that changes be made which mandate that those who are unemployed be required to work in either public or private sector workplaces which provide "real world" jobs - not undemanding make work programs. If people continue to have the option to not work for 40 weeks a year, why should they be expected to change? Given the current level of subsidy for business in Canada and New Brunswick, we are not concerned about the use of work programs to subsidize business. If labour is provided and subsidized through UI, the corporate taxation policies can be changed to accommodate such programs. Given the high percentage of unemployed people, we have to look at different options - if we believe that a job/career can make a positive contribution to the people of this province.

In essence, the solutions are not simple. Attitudes and behaviours of the population have to be changed. If environments are not created which encourage people to have higher expectations, the change will be external, negative and economically devastating for this region. People need to work; we believe they should be required to work, if jobs are available.

Business Development

Unless governments are prepared to accept the full responsibility for economic development, they will have to begin the process of attitude change within the business community. A business community of a area is made up of the people of the area - so the problems identified above are equally applicable.

No one can argue that it is a difficult time to be in business. However, there are successful and energetic businesses that are doing well today, and some of those are in the Study Area. However, as with the banking industry, many businesspeople have ceased to be willing to take risks or make changes. A part of those changes must be generated within the actual business operations. There will have to be changes in the distribution systems, in the internal operating systems, and in the training and development of employees. However, businesspeople have to be encouraged to undertake such programs - they have to be encouraged to change their attitudes. Such can be facilitated through exposure to new ideas - exposure to new ways of operating and, perhaps, assistance to those businesses that are willing to change and expand the potential for the region. We have been involved with people in this area for several years - and we have heard the same comments repeatedly, even as economic conditions worsen. Perhaps the exposure to people who have been successful in similar areas can be used as a vehicle to stimulate business development. Business has become too dependent on government solving its problems. If a more entrepreneurial spirit is not rekindled we will see, as participants predict, a continuing decline in business activity in the region.

Business - Directed Development

A contributor to the current situation is a malaise within the business community - a malaise based on the belief that they can't be successful - that too many external factors limit their growth. Our observations suggest that limitations are as much internal to the business owners as external. We suggest that business leaders in the area be challenged to develop new business - primarily small business operations. We suggest the need to test and re-orientate the business community in the Study Area. To this end, we suggest

a pilot project for the area. Without using any of the existing business development groups, we encourage the set up of a group of ten business people who will be charged with the development of businesses appropriate to the area. Through a cooperative effort, we suggest that this group be charged with the appropriation of a limited amount of funds for business starts. The decisions on the type of businesses would rest entirely within this group and the primary objective would be the creation of businesses which build on existing resources and provide a meaningful work situation for area residents. In this project, the business people would be accountable for their investment decisions while being provided the opportunity to make a positive contribution to the region. We recommend a two year test period. This approach would provide the opportunity for the local business community to actually take charge of a portion of economic development of the region. Success may provide future resources to fuel private sector regional development.

Taxation Policies

We concur with some of the suggestions made by members of the business community. However, tourism will not develop under the current economic conditions. The natural beauty of the area will not overcome the problems created by high consumption taxes and a strong dollar. If taxation and fiscal policies are not altered, the "pass-through" province has a great potential to become the "turn-around" province - tourists enter, take a look at prices and turn around immediately. The net effect of a revision in these policies will require revision of the corporate tax rates and reduced government expenditures. Until a more positive economic climate is provided for the potential tourist, we suggest that investment in tourism infrastructure will do little more than create more short-term employment for the region.

Government Encourages and Regulates

We also concur that the aquaculture industry represents a growth opportunity. However, we do not see the benefits of subsidy for that industry. The industry is world-wide and the competition is fierce.

The industry has to build on its strength and it has to be competitive. We believe that the only appropriate roles for government are regulation - regulation which ensures quality and facilitates rather than hinders the growth of the industry and encouragement of development within the industry. The major resources needed by this industry are in place.

Government Recruits

As suggested in our approach to venture capital, we suggest that the region will develop through small business. While the pool of labour is available, we see little opportunity for the development of a large manufacturing operation in the region. Competition for those operations are world wide. Given the potential for a North American FTA, the large-scale solution seems more remote. However, small business development comes from a pool of people willing to take a risk. If that pool of people is not found in the area, we suggest that government should play a role in recruiting people who want to have the quality of life New Brunswick can offer and run a small business. Certainly, as many business publications indicate, there is a pool of skilled managers, unemployed as a result of the recession and unlikely to find the same types of jobs post-recovery, who are considering small business start-ups. The promotion of New Brunswick to this market could be a way of attracting new residents and new businesses. However, such will be contingent on the resolution of the current constitutional crisis. If the Maritimes are distanced from the rest of Canada by an independent Quebec, given the current perceptions of the region within confederation, it is highly unlikely that this area would be considered as an attractive place in which to invest.

Future Studies

While not included in this report, we suggest that every aspect of the region which could be studied has been studied. At our business risk, we suggest that further allocation of resources for studies would be better invested in business development activities. We suggest that those who are involved with this region compile all known reports, and review the recommendations that have been made, identify the consistent patterns and act on those recommendations.

We further suggest that there be no more efforts to understand those parts of this province which are having difficulty. The commonality of information from this study and the one in the Acadian Peninsula suggest that the downside of the problem is documented. If other studies are to be conducted, we suggest that resources be allocated to determining why a community is successful in order to provide the basis for trying to stimulate success in other areas.

Summary

We recommend a long term approach for the region - one which focuses on changing attitudes and habits and one which changes some of the rules for existing programs. While business in the region suggests that governments have not done an excellent job in trying to solve the economic development problems of the region, they suggest that governments should be given the primary responsibility for the future. We suggest that people in the area, as a part of becoming more independent, have to assume a large part of the responsibility for the development of their region with less reliance on government assistance. If the people of the region do not make a significant contribution to its future, we envision a future more like the past with less government assistance.

Appendix A

Bibliography

New Brunswick Skill Shortages Labour Market Analysis
By Department of Advanced Education and Training, September 29, 1989.

Cross-Border Shopping Strategic Framework and Action Plan
For Economic Development Commissioner, Office of the Premier of New Brunswick and Deputy-Minister, New Brunswick Department of Commerce and Technology,
By Gestion Madawaska Management, June 5, 1991.

Cross-Border Shopping Questionnaire Results, City of Cornwall
For Cornwall Chamber of Commerce,
By The Business Council of Cornwall Chamber of Commerce, June 1991.

Cross-Border Dispute, Canadian Consumer
By Derek Stevenson, Canadian Consumer, July/August 1991.

New Brunswick Directory of Products and Manufacturers
Department of Commerce and Technology, 1990.

An Analysis of the Concept of Factory Outlets for New Brunswick
By WMS Associates Ltd. and Quest-Com Ltd., March 1990.

Exporting Services to the U. S. - Guide
For Industry, Science and Technology Canada,
By Ernst Young, April 1990.

Cross-Border Shopping Strategy Plan
By New Brunswick Chamber of Commerce Task Force on Cross-Border Shopping, September 1991.

A Preliminary Study of the Competitiveness of Distribution Channels
For Industry, Science and Technology Canada,
By Ernst Young, March 1991.

Study to Identify Potential Business Opportunities in Charlotte County
For Charlotte County Community Futures Committee,
By Fiander-Good Associates Ltd., December 9, 1988.

New Brunswick Regional Economic Development Commissions: An Evaluation and Recommendations for Future Regional Development Efforts
For Department of Commerce and Technology of New Brunswick,
By Price Waterhouse, N. D.

An Economic Development Strategy: Miramichi Region Development Corporation
For Miramichi Region Development Corp.,
By Siskin Management Inc., February 16, 1990.

St. Stephen: Employment Adjustment and Employment Development Strategy, 1985.

Brief for Presentation to the Cabinet Committee on Economic Development
By Charlotte County Citizens Advisory Committee, 1987.

Study to Identify Potential Business Opportunities in Charlotte County,1988.

Tourism Opportunity Study, St. George, NB, 1989.

Report of the St. Stephen Labour Market Assessment and Manpower Planning Committee, N. D.

Report on Economic Development in New Brunswick - A Business Survey
For Department of Commerce and Technology and Board of Management by Baseline Market Research, Ltd., December 1990.

Report on Labour Market Study of the Newcastle Service Area
For Canada Employment and Immigration, Northumberland Region, November 1990.

Brief for Presentation to the Cabinet Committee on Economic Development
By Charlotte County Citizens Advisory Committee, 1987.

Chocolate Theme Park, New Brunswick Economic Feasibility Study and Concept Development Plan St. Stephen
By Forrec International Corporation, 1988.

Appendix B

Questionnaire: Household

Study # 91080
CHARLOTTE COUNTY LABOUR MARKET STUDY
HOUSEHOLD SURVEY

RESP NUMBER ..... ___ ___

TEL EXCHANGE ..... ___ ___ ___

CLASSIFICATION INFORMATION

A. TOTAL NUMBER IN HOUSEHOLD BETWEEN 15 AND 64 .... ___ ___

B. GENDER

MALE 1
FEMALE 2

C. LOCATION OF RESIDENCE

CHARLOTTE COUNTY 1
MCADAM 2

D. Let me just begin with a specific question....in what year were you born

ENTER YEAR ..... ___ ___

CHECK TO ENSURE CORRECT YEARS BETWEEN 1977 AND 1928
INTERVIEWERS: CHECK QUOTAS IF APPROPRIATE

SECTION A ASK OF ALL

Now, we want to ask some questions about employment....

A1 Are you currently employed, unemployed, retired, disabled, a student (IF FEMALE) a housewife or what?

IF EMPLOYED:

Are you employed full time, that is working at least 30 hours per week, or part time, that is working less than 30 hours per week?

FULL TIME ..... 11 ┐ **ASK**
PART TIME ..... 12 ┘ **A1A**

IF UNEMPLOYED

Have you been actively looking for work during the past *four weeks* or not actively looking for work during the past four weeks?

ACTIVELY LOOKING ..... 13 → **A1C**
NOT ACTIVELY LOOKING ..... 14 → **A1B**

IF A STUDENT

Are you currently working part time in addition to your attendance at school?

NO - FULL TIME STUDENT ..... 15 ┐
YES - STUDENT AND WORK ..... 16 ┘ GO TO
DISABLED 17
RETIRED ..... 21 SECTION
HOUSEPERSON ..... 22 C
DK/REF/NA 97

INTERVIEWER: IF RESPONDENT REFUSES TO ANSWER, EXPLAIN IMPORTANCE AND ASK QUESTION AGAIN - IF R CONTINUES TO REFUSE, THANK AND END

A1A IF EMPLOYED: Are you currently self-employed or do you work for someone else?

YES - SELF-EMPLOYED	1	GO TO
NO - SOMEONE ELSE	2	
DK/REF/NA	7	SECTION C
NOT APPROPRIATE	0	

A1B Can you tell me why you are not actively looking for work at this time? (DO NOT PROVIDE RESPONSES)

_____

_____ .. __ __

DK/REF/NA	97
NOT APPROPRIATE	00

A1C Would you be prepared to work part time or full-time if you were offered employment?

YES - FT	1
YES - PT	2
YES - EITHER	3
NO	4
DK/REF/NA	9
NOT APPROPRIATE	0

IF NOT LOOKING FOR WORK - GO TO SECTION C
ELSE CONTINUE

SECTION B ASK OF THOSE SEEKING EMPLOYMENT

B1 Altogether, how many weeks have you been looking for work?

# OF WEEKS	__ __
DK/REF/NA	99
NOT APPROPRIATE	00

B2 Have you found it very, somewhat, or not very difficult to find a job

VERY DIFFICULT	1
SOMEWHAT DIFFICULT	2
NOT VERY DIFFICULT	3
DK/REF/NA	9
NOT APPROPRIATE	0
NOT DIFFICULT - WAITING FOR SEASON OR CALL BACK	4 → GO TO B4

B3 What would you say is the major reason why you have not found a job, as yet? Any other reason?

	FIRST MENTION	SECOND MENTION
NO JOBS AVAILABLE	11	11
LACK OF EDUCATION	12	12
LACK OF WORK EXPERIENCE	13	13
LACK OF JOB SKILLS	14	14
UNWILLING TO TRAVEL	15	15
UNWILLING TO RELOCATE	16	16
NO RETRAINING PROGRAMS AVAILABLE	17	17
OTHER (SPECIFY) _____	18	18
DK/REF/NA	97	97
NOT APPROPRIATE	00	00

B4 Are you looking for a job ... within Charlotte County/the McAdam area ... within NB ... or where?

WITHIN CHARLOTTE 1
WITHIN MCADAM 2
WITHIN NEW BRUNSWICK 3
OUT OF PROVINCE 4
OTHER 5
ANYWHERE 6
DK/REF/NA 9
NOT APPROPRIATE 0

B5 Where would you most prefer to find a job ... within Charlotte County/the McAdam area ...within NB ... or where?

WITHIN CHARLOTTE 1
WITHIN MCADAM 2
WITHIN NEW BRUNSWICK 3
OUT OF PROVINCE 4
OTHER 5
ANYWHERE 6
DK/REF/NA 9
NOT APPROPRIATE 0

B6 How optimistic are you about finding a job in Charlotte County/the McAdam area ... very optimistic, somewhat optimistic, not very optimistic, or not at all optimistic?

VERY OPTIMISTIC 1
SOMEWHAT OPTIMISTIC 2
NOT VERY OPTIMISTIC 3
NOT AT ALL OPTIMISTIC 4
NO OPINION 5
DK/REF/NA 9
NOT APPROPRIATE 0

B7 When was the last time you had a permanent job where you worked regularly, either full-time or part-time ...

...Within the past six months 1
...Between seven and twelve months ago 2
...More than a year ago 3
NEVER 4
DK/REF/NA 9
NOT APPROPRIATE 0

B8 How interested are you in moving to another area of New Brunswick - outside Charlotte County (the McAdam area) to get a job....

Very interested 1
Somewhat interested 2
Not very interested 3
Not at all interested 4
DK/REF/NA 9
NOT APPROPRIATE 0

B9 Is there anything that limits your ability to move away from Charlotte Country(the McAdam area) to get a job? (PROBE FOR ANSWER AND RECORD EXACT RESPONSE)

_____

_____ .....__ __

NO LIMITS 95
DK/REF/NA 99
NOT APPROPRIATE 00

SECTION C - WORK HISTORY ASK OF ALL RESPONDENTS

C1 Altogether, how many years of work experience outside the home do you have?

ENTER NUMBER OF YEARS .....__ __
DK/REF/NA 97
NONE - NEVER WORKED OUTSIDE THE HOME ..... 95→GO TO C6

C2 Altogether, how many employers have you had during the past five years (IF EMPLOYED: does that include your current employer)?

ENTER NUMBER ..... __ __
DK/REF/NA 97
NOT APPROPRIATE 00
HAVE NOT WORKED IN 5 YRS ..... 96 → ASK C3

C2A During the past five years, have you moved from one community to another because of work ... IF YES ... how many times have you moved because of work during the last five years?

ENTER NUMBER OF TIMES .....__ __
DK/REF/NA 97
NOT APPROPRIATE 99

C3 Are you currently a member of any labour union? IF YES Which union is that?

NAME OF UNION_____ .....__ __
NO 95
DK/REF/NA 97
NOT APPROPRIATE 00

IF NO WORK EXPERIENCE IN THE LAST FIVE YEARS, GO TO C6

In the next series of questions we want to know about the jobs you've had between 1986 and today....

C4 Beginning with your most recent (current job) ASK EACH QUESTION IN THE TABLE AND THEN REPEAT WITH: and what about the job you had before this one (between 1986 and today)

	CURRENT RECENT	SECOND JOB	THIRD JOB
A. What did/do you do for work?			
1st _____			
2nd _____			
3rd _____	— — —	— — —	— — —
REF/NA	999	999	999
NOT APPRO	000	000	000
B. In which type of industry is/was this job....(USE CARD TO RECORD CORRECT RESPONSE)			
1st: _____	— —	— —	— —
2nd _____			
3rd _____			
DK/RE/NA	99	99	99
NOT APPROPRIATE	00	00	00
C. On average, how many hours per week did/do you work at this job (ENTER HOURS)	___ —	___ —	___ —
DK/REF/NA	99	99	99
NOT APPROPRIATE	00	00	00
D. Is/was this job...			
permanent or	1	1	1
temporary/seasonal	2	2	2
DK/REF/NA	7	7	7
NOT APPROPRIATE	0	0	0
E. Altogether, how many years have you been (were you) employed in this job?	___ —	___ —	___ —
LESS THAN 1 YEAR	95	95	95
DK/REF	99	99	99
NOT APPROPRIATE	00	00	00
F. Where is/was this job located.....			
within Charlotte County	1	1	1
(within the McAdam Area)	2	2	2
in another area within N.B	3	3	3
in another province	4	4	4
OTHER	5	5	5
DK/REF/NA	9	9	9
NOT APPROPRIATE	0	0	0

C4G IF APPROPRIATE: Why did you leave your current/recent; second; third job?

CURRENT/RECENT_____

_____ . . . . . __ __

DK/REF/NA 98
NOT APPROPRIATE 00

SECOND_____

_____ . . . . . __ __

DK/REF/NA 98
NOT APPROPRIATE 00

THIRD_____

_____ . . . . . __ __

DK/REF/NA 98
NOT APPROPRIATE 00

C5 We'd like to know how satisfied you were/are with your last/current job ... generally speaking, (REPEAT POINT) would you say that you were/are satisfied or dissatisfied with (READ EACH ITEM) IN THAT JOB ... (AFTER INDICATION OF SATISFACTION OR DISSATISFACTION ASK FOR EACH:) how satisfied/dissatisfied ... very or somewhat?

	SATIS - VERY	SATIS - SOME	DISSAT- SOME	DISSAT- VERY	DK/REF	NOT APPRO
the pay you receive(d)	4	3	2	1	9	0
the opportunities for training	4	3	2	1	9	0
the job security provided	4	3	2	1	9	0
the numbers of hours per week that you can/could work	4	3	2	1	9	0

C6 Thinking about the experiences you've had and your education and training, what would you say are the most important skills or training that you have - what type of skills do you have that make you a valuable employee?

_____

_____ . . . . . __ __

NOTHING IN PARTICULAR 95
DK 97
REF/NA 98
NOT APPROPRIATE 00

C7 Given your lifestyle and skills, what hourly rate do you think would be a fair rate of pay for you in a full time permanent job? (ENTER EXACT $ AMOUNT)

ENTER RATE . . . . . __ __ __.__ __
DK/REF/NA 999.99
NOT APPROPRIATE 000.00

SECTION D TRAINING AND EDUCATION ASK OF ALL

We'd like to turn to a few questions about education and training ...

D1 First of all, what was the highest level of education that you completed...grammar or elementary, high school, community college or vocational school, university or graduate school?

ELEMENTARY OR GRAMMAR...IF YES what grade did you complete? ..... ___ ___

HIGH SCHOOL ... ASK: did you graduate

YES 09
NO 10

COMMUNITY COLLEGE/VOCATIONAL SCHOOL
... IF YES did you receive a certificate or diploma

YES 12
NO 11

UNIVERSITY OR HIGHER...IF YES did you receive a degree?

NO 13

IF YES: which type of degree did you receive?

BACHELOR LEVEL 14
MASTERS LEVEL 15
DOCTORAL LEVEL 16
DK/REF/ 97
NA 98

D2 In what year did you complete this level of education/this degree?

ENTER YEAR ..... ___ ___
DK/REF/NA 97

D3 In the last five years, have you been enroled in any other type of education program or training which was related to work or possible employment.

YES 1
NO ..... 2→ASK D4
DK/REF/NA 7

D3A I want to ask you about the most recent course or training program that you have taken... (READ Q'S BELOW) REPEAT POINT: did you take part in any other training or courses in the last five years?

	MOST RECENT	PRIOR
What course or training did you take? 1st _____ _____ 2nd _____	___	___
DK/REF/NA	997	997
NOT APPRO	000	000
In what year did you take this course/training	__ __	__ __
DK/REF/NA	97	97
NOT APPRO	00	00
Was this course or training related to work that you were doing at the time?		
YES	1	1
NO	2	2
DK/REF/NA	7	7
NOT APPRO	0	0
What was the major benefit or skill you improved or learned through this course? 1st _____ _____ 2nd _____ _____	___	___
DK/REF/NA	997	997
NOT APPRO	000	000
Who paid for this training/education...		
you personally	1	1
your employer	2	2
government	3	3
OTHER_____	4	4
DK/REF/NA	9	9
NOT APPROPRIATE	0	0

D4 Given your work experience and skills, how interested are you in additional training or education to upgrade your job skills at this point in time ... very interested ... somewhat interested ... not very interested or not at all interested ?

VERY INTERESTED 4
SOMEWHAT INTERESTED 3
NOT VERY INTERESTED 2
NOT AT ALL INTERESTED ..... 1] GO TO
DK/REF/NA ..... 9] D5

D4A What type of training would you be interested in - what type of skills would you like to learn or improve?

_____

_____ ..... ___

DK/REF/NA ..... 997] GO TO
NOT APPROPRIATE ..... 000] D5

D4B What prevents you taking this type of training now -

_____

_____ ..... ___ ___

DK/REF/NA 97
NOT APPROPRIATE 00

Now, changing the subject a bit....

D5 Do you use a calculator on a regular basis - either at home, school or work?

YES 1
OCCASIONAL/RARELY 3
NO 2
DK/REF/NA 9

D6 Do you have a computer or use one on a regular basis IF YES ... is that used in the home, at work/school or both?

OWN - USE AT HOME 1
OWN - USE AT WORK 2
OWN - USE BOTH PLACES 3
USE AT WORK 4
OTHER COMBINATION 5
NO 6
DK/REF/NA 7
N.A. 9

D7 Do you have a VCR? IF YES ... do you or does someone else program the VCR to record programs from TV

RESPONDENT OR/AND OTHERS PROGRAM 1
OTHERS PROGRAM 2
NO ONE PROGRAMS 3
DO NOT OWN A VCR 4
DK/REF/NA 5

D8 What is your major source of news about what's going on in the province or the country ... radio, television or newspapers?

RADIO 1
TELEVISION 2
NEWSPAPERS 3
COMBINATION 4
OTHER 5
DK/REF/NA 9

D9 Do you have a newspaper delivered to your home or do you buy one on a regular basis?

YES 1
NO 2
DK/REF/NA 9

D10 How often do you read a newspaper ... daily ... weekly ... every once in awhile?

DAILY 1
WEEKLY 2
ONCE IN AWHILE 3
DK/REF/NA 9
NOT APPROPRIATE 0

SECTION E: PERCEPTIONS OF CHARLOTTE COUNTY/MCADAM AREA -- ASK OF ALL

Now we want to get your general impressions about Charlotte County/the McAdam area?

E1 What's your overall impression of Charlotte County/the McAdam Area ... READ EACH ITEM ... excellent, good, only fair .. poor?

	EXCEL	GOOD	ONLY FAIR	POOR	DK/REF NA
As a place to live	4	3	2	1	9
As a place to work	4	3	2	1	9
As a place for young people to find work	4	3	2	1	9
As a place for you to be able to do the type of work that you like to do	4	3	2	1	9
As a place to spend the rest of your life	4	3	2	1	9
As a place that has a good economic future	4	3	2	1	9

E2 If you needed a job and the only one that was available meant that you had to move away from Charlotte County/the McAdam Area, how likely would you be to accept that job ... very likely, somewhat likely or not very likely...

VERY LIKELY 1
SOMEWHAT LIKELY 2
NOT VERY LIKELY 3
DK/REF/NA 9
NOT APPRO 0

E2A What, more than anything else, would make/makes you want to stay in Charlotte County/the McAdam area?

_____

_____ ..... __ __

NOTHING IN PARTICULAR 95
DK/REF/NA 99
NOT APPROPRIATE 00

SECTION F ASK OF ALL

Now, I want to turn to a few questions about unemployment benefits

F1 Have you personally received any Unemployment Insurance benefits during the past year?

YES	1	
NO	2	ASK F2
DK/REF/NA	9	

F1A Altogether, how many weeks during the past year did you receive UI benefits?

ENTER NUMBER OF WEEKS	__ __
DK/REF/NA	97
NOT APPROPRIATE	00

F1B Altogether, how many weeks did you work in the past year - in 1991

ENTER NUMBER OF WEEKS	__ __
DK/REF/NA	97
NOT APPROPRIATE	99

F2 Did any other members of your household receive UI benefits in the past year? IF YES ... how many?

ENTER NUMBER	__ __
NONE	95
DK/REF/NA	97
NOT APPROPRIATE	99

SECTION G DEMOGRAPHICS ASK OF ALL

Now, just before I end, I have to ask a few questions about you so that we can compare the results in different groups of people ...

G1 Altogether, how many people including yourself live in your household?

ENTER NUMBER	__ __
DK/REF/NA	98

G2 Are you currently married . . . separated . . . divorced . . . widowed . . . single or what?

MARRIED (COMMON LAW)	1
SEPARATED	2
DIVORCED	3
WIDOWED	4
SINGLE	5
DK	7
REF/NA	9

G3 How long have you lived in your community?

less than 1 year	1
between 1 and five years	2
between six and 10 years	3
more than 10 years	4
REF/NA	9

G4 Thinking of your personal income in 1991 . . . that is your personal income from all sources before taxes, was your personal income in 1991

A. More than $20,000
YES ..... GO TO B
NO 11

B. More than $30,000
YES ..... GO TO C
NO 12

C. More than $40,000
YES ..... GO TO D
NO 13

D. More than $50,000
YES ..... GO TO E
NO 14

E. More than $60,000
YES 16
NO 15
DK/REF/NA 99

DO NOT ASK G5 IF SINGLE PERSON HOUSEHOLD

G5 Thinking of the total income for your household in 1991 . . . that is income from all sources before taxes, was your total household income in 1991

A. More than $20,000
YES ..... GO TO B
NO 11

B. More than $30,000
YES ..... GO TO C
NO 12

C. More than $40,000
YES ..... GO TO D
NO 13

D. More than $50,000
YES ..... GO TO E
NO 14

E. More than $60,000
YES 16
NO 15
DK/REF/NA 99
NOT APPROPRIATE 00

And finally,

G6 What is the postal code of your residence? ..... _ _ _ _ _ _

Thanks very much for your time, that is all the questions I have.

G7 LENGTH OF INTERVIEW ..... __ __

CHECK FOR COMPLETION . . . THANKS

Questionnaire: Business

91080 RESP ___ ___ ___

LABOUR MARKET STUDY TEL ___ ___ ___
Charlotte County/McAdam Area
Employer Survey

In the first part of this survey we want to ask some questions about your company....

A1 First of all, how long have you been in business, in your current operation?

ENTER YEARS ..... ___ ___
LESS THEN ONE YEAR 95
DK/REF/NA 99

A2 How would you describe your business? PROBE: What do you make or do?

_____

_____ ..... ___ ___ ___

DK/REF/NA 999

A3 Is your business a year round or seasonal operation?

YEAR ROUND 1
SEASONAL 2
DK/REF/NA 9

A4 Do you export any products or services through your business operation?

YES 1
NO 2
DK/REF/NA 9

A5 What type of business structure do you have ...

a single owner 1
a partnership 2
a corporation 3
or what
(SPECIFY_____) .. 4
DK/REF/NA 9

A6 Is your business owned by ...

people who live in the area 1
people from other areas of New Brunswick 2
people from outside the province 3
or what 4
DK/REF/NA 9

A7 What happened in your business during 1991 - did you increase or decrease your total revenue or did it stay at the same level as 1990?

INCREASED 1
STAYED THE SAME 2
DECREASED 3
DK/REF/NA 9

A8 What do you expect to happen this year - in 1992 - do you expect your total business revenue to increase, stay the same or decrease?

INCREASE 1
DECREASE 3
STAY THE SAME ..... 2 } GO TO A9
DK/REF/NA ..... 4 }

A8A Why do you expect total revenues to (REPEAT RESPONSE TO A8) - what will be the major cause for this change?

_____

_____ __ __

DK/REF/NA 99
NOT APPROPRIATE 00

A9 What would you say is your company's strong point ... what's your greatest strength as a business?

_____

_____ __ __

DK/REF/NA 99
NOT APPROPRIATE 00

A10 What would you say is your company's weak point ... what's your weak spot in business?

_____

_____ __ __

DK/REF/NA 99

A11 Given what you know about your business and your competitors... how competitive do you think your operation is ... very competitive, somewhat competitive or not very competitive?

VERY COMPETITIVE ..... 1 → GO TO A12
SOMEWHAT COMPETITIVE ..... 2 → ASK
NOT VERY COMPETITIVE ..... 3 → QA11A
DK/REF/NA 9

A11A What would you have to do to make your business more competitive?

_____

_____ __ __

DK/REF/NA 99
NOT APPROPRIATE 00

A12 Are you planning any changes in your business in 1992 - changes in operations, marketing or whatever? (IF YES PROBE FOR CLEAR DESCRIPTION)

_____

_____ __ __

NO CHANGES PLANNED 95
DK/REF/NA 99

A13 Taking all things into consideration, how optimistic are you about economic prospects for the Charlotte County/McAdam area over the next year ... very optimistic, somewhat optimistic, not very optimistic or not at all optimistic?

VERY OPTIMISTIC 1
SOMEWHAT OPTIMISTIC 2
NOT VERY OPTIMISTIC 3
NOT AT ALL OPTIMISTIC 4
DK/REF/NA 9

A14 How about over the next five years ... are you very optimistic, somewhat optimistic, not very optimistic or not at all optimistic about economic prospects for the Charlotte County/McAdam area?

VERY OPTIMISTIC 1
SOMEWHAT OPTIMISTIC 2
NOT VERY OPTIMISTIC 3
NOT AT ALL OPTIMISTIC 4
DK/REF/NA ..... 9 → GO TO B1

A14A Can you tell me why you are (REPEAT RESPONSE FROM A14) about economic prospects for the area over the next five years?

_____

_____ ___

DK/REF/NA 99
NOT APPROPRIATE 00

Section B

Next, we want to turn to a few questions about your employees ...

B1 Altogether, how many employees, excluding yourself, did you have in 1991?

ENTER NUMBER ..... ___ ___

SOLE PROPRIETORSHIP ..... 95 → GO TO B2
DK/REF/NA 99

B1A How many of these employees were (READ EACH AND AFTER EACH ASK) How many of those full-time employees/part-time employees are permanent/year-round and how many are seasonal positions?

	# EMPLOYEES	PERMANENT JOBS	SEASONAL JOBS
Full-time, working 30 hours per week or more?	___ ___	___ ___	___ ___
	95	95	95
DK/REF/NA	97	98	98
NOT APPRO	00	00	00
Part-time, working less than 30 hours per week?	___ ___	___ ___	___ ___
	95	95	95
DK/REF/NA	97	98	98
NOT APPRO	00	00	00

IF ANY SEASONAL EMPLOYEES

B1B During your peak season, how many full-time/part-time employees do you have ... and how many during your slower season?

TYPE	HIGH SEASON	SLOW SEASON
# FULL-TIME	___	___
DK/REF/NA	98	98
NOT APPRO	00	00
# PART-TIME	___	___
DK/REF/NA	98	98
NOT APPRO	00	00

B2 Did the number of employees in your operation increase, stay the same or decrease during 1991?

INCREASED 1
STAYED THE SAME 2
DECREASED 3
DK/REF/NA 9

B3 What do you expect to happen this year - in 1992 - will the number of employees in your operation increase, stay the same or decrease?

INCREASED 1
DECREASED 3
STAY THE SAME ..... 2 → SKIP TO B4
DK/REF/NA 9

B3A Altogether, how many full-time and how many part-time jobs do you expect to increase/decrease in 1992?

FULL-TIME POSITIONS ..... ___ ___
DK/REF/NA 98
NOT APPROPRIATE 00

PART-TIME POSITIONS ..... ___ ___
DK/REF/NA 98
NOT APPROPRIATE 00

B3B Why do you expect the number of employees to (REPEAT RESPONSE TO B3) - what's the major cause for this change?

_____

_____ ___ ___

DK/REF/NA 99
NOT APPROPRIATE 00

B3C **IF EXPECTED TO INCREASE # OF EMPLOYEES:** Where do you expect to find these new employees ... from within the Charlotte County/McAdam area ... from other parts of New Brunswick or from outside the province?

FROM WITHIN THE AREA 1
FROM WITHIN NEW BRUNSWICK 2
FROM OTHER AREAS 3
COMBINATION 4
DK/REF/NA 9
NOT APPROPRIATE 0

B3D As your business changes over the next five years, do you expect these employees to need any particular training or experience for these new positions - any skills that are different from those of your current work force ... IF YES: what skills or experience?

_____

_____ ___ ___ ___

DK/REF/NA 999
NOT APPROPRIATE 000

IF NO EMPLOYEES SKIP TO C3

B4 Thinking about your current employees, what is the minimum education level you require of your employees today ... and what about in the future - in the late 1990's and into the future ... what will be the minimum education someone will have to complete to be employed in your business?

LEVEL OF EDUCATION	CURRENT	FUTURE
GRADE 9 OR LESS	1	1
AT LEAST SOME HIGH SCHOOL	2	2
HIGH SCHOOL GRADUATE	3	3
SOME UNIVERSITY OR COMMUNITY COLLEGE	4	4
COMMUNITY COL GRAD	5	5
UNIVERSITY GRAD	6	6
OTHER (SPECIFY)	7	7
DK/REF/NA	9	9

B5 Do you have any problems in finding people to work in your business today?

NO ..... 2 GO TO B6
DK/REF/NA 9
YES 1

B5A Why do you think you have problems in finding people to work today? (PROBE FOR DETAILS)

_____

_____ ..... ___ ___

DK/REF/NA 99
NOT APPROPRIATE 00

B6 What do you consider the single biggest problem in managing employees today - the biggest employee-related problem you have to face as a business person?

_____

_____ ..... ___ ___

DK/REF/NA 99

B7 On average, what percentage of your work-force is replaced/turns over each year?

ENTER PERCENT ..... __ __
DK/REF/NA 99

Next, we want to ask some general questions about the type of training available to people in your organization today ...

C1 First of all, as an employer, do you provide any training for your employees?

YES 1
NO ..... 2 GO TO C2
DK/REF/NA 9

C1A Do you provide any of the following? (READ EACH TYPE)

TYPES	YES	NO	DK/RE/NA	NOT APPRO
on-the-job training	1	2	9	0
apprenticeship training	1	2	9	0
marketing/sales training	1	2	9	0
supervisory/management training	1	2	9	0
personnel development	1	2	9	0
financial or budget management	1	2	9	0
clerical training	1	2	9	0
training in computers	1	2	9	0
any other types (SPECIFY)	1	2	9	0

C1B Do you use any of the following to put on training programs for your employees ... (READ EACH)

	YES	NO	DK/REF	NOT APPRO
staff within your company	1	2	9	0
staff from other firms in the area	1	2	9	0
community colleges	1	2	9	0
private consultants	1	2	9	0
training institutes or programs	1	2	9	0
other sources for training	1	2	9	0

C1C In a typical year, what percent of your employees, on average, are taking part in some type of training?

ENTER % ..... __ __
DK/REF/NA 99
NOT APPROPRIATE 00

C1D In general, who pays for this employee training....

your company alone	1
your company and your employees	2
the government	3
you and the government	4
or who (SPECIFY)_____	5
DK/REF/NA	9
NOT APPROPRIATE	0

C1E Altogether, how much did your company actually spend on training employees in 1991. PROBE - Your best estimate.

ENTER AMOUNT		___ ___ ___ ___ ___
NOTHING	99995	
DK/REF/NA	99996	
NOT APPRO	99997	

C2 Looking ahead over the next five years, do you think that you will need any special training for your employees?

YES	1	
NO	2	GO TO C3
DK	9	
NOT APPRO	0	

C2A What type of training will you need in the future (CODE FIRST TWO MENTIONS)

FIRST

_____

_____ ___ ___

DK/REF/NA	99
NOT APPRO	00

SECOND

_____

_____ ___ ___

DK/REF/NA	99
NOT APPRO	00

C3 Looking ahead, in a general sense, what, if anything do you see as the biggest challenge you face as an employer/potential employer in the 1990's?

_____

_____ ___ ___

DK/REF/NA	99

SECTION D

Finally, before we end, we'd like to get your views on future economic development in the Charlotte County/the McAdam area

D1 What do you see as the growth areas for the Charlotte County/McAdam area ... what industries have a real chance for success in the 1990's?

FIRST MENTION_____

_____ ..... __ __

DK/REF/NA 99

SECOND MENTION_____

_____ ..... __ __

DK/REF/NA 99
NOT APPROPRIATE 00

D2 How satisfied are you with the performance of (READ EACH ITEM) in economic development activities in this area ... very satisfied, somewhat satisfied, not very satisfied or not at all satisfied

	LEVEL OF SATISFACTION:					
	VERY SATIS	SOME-WHAT	NOT VERY	NOT AT ALL	DK	REF/ NA
the business community	4	3	2	1	7	9
the federal government	4	3	2	1	7	9
the provincial government	4	3	2	1	7	9
municipal governments	4	3	2	1	7	9
the local boards and development commissions	4	3	2	1	7	9

D3 Looking ahead, what's the greatest barrier to the economic development of this region in the 1990's?

_____

_____ ..... __ __

DK/REF/NA 99

D4 Looking ahead again, what do you think has to be done to ensure a solid economic future for this area? ... IF A RESPONSE ... and who is going to get that accomplished ... ?

TO BE DONE_____

_____ ..... __ __

DK/REF/NA 99

WHO WILL DO_____

_____ ..... __ __

NO ONE WILL 95
DK/REF/NA 99
NOT APPROPRIATE 00

D5 Do you have any other comments about future economic development in the Charlotte County/McAdam area?

_____

_____

_____

_____

And we just have one last question so that we can compare the opinions of people within business of different sizes ...

D6 In 1991, was you total business revenue - before taxes ...

more than $ 250,000	NO	1
more than $ 500,000	NO	2
more than $ 750,000	NO	3
more than $ 1,000,000	NO	4
	YES	5
DK/REF/NA		9

ASK OF THOSE IN THE 466, 529 AND 784 EXCHANGES:

Finally, in a couple of weeks Baseline will be organizing a focus group discussion with business owners and managers in the St. Stephen/McAdam area to talk about some of the items we've talked about in this study as well as other issues facing businesses. It would be informal with about 10 participants - at this point we'd haven't finalized the date or time but if you're interested we could call you back in a couple of weeks with more definite information.

YES INTERESTED	1
NO NOT INTERESTED	2
NOT ASKED	3

Appendix C

Household

Moderator's Guides And

Participant Profiles

Moderator's Guide
McAdam Area Group

Introduction

Present Discussion topic

Thank, explain taping and payments

Ask participants to tell a little about themselves

If employed - what they do for work and for how long

If not employed - what is your work experience - how long have you been unemployed

Future Direction

What do you think McAdam will be like in 10 years - in the year 2000?

What types of jobs will be here

Who will be living here

What will you be doing - is that what you want?

What will your children be doing then?

What would you like to see McAdam be like in the year 2000?

Things are changing ...

UIC

What do you think of UI - as it is today?

What would happen if the rules were changed so that people only go on UI for the number of weeks that they actually worked?

What changes would you support?

What if there is no UI in 5 years - what would life be like in McAdam?

Social Assistance

Is the fact that we have a safety net - social assistance - good for this region?

What changes in it would benefit this region?

What would happen if there were a requirement added that all people on social assistance who could work were required to be in some type of work program?

What if people on social assistance were required to be in a training program - would that have any effect on this area - what effect?

Training

A part of our research responsibility is to look at training needs and interests of residents of this area ... let's talk about that.

What type of training have you taken ...

Why did you take that?

What benefit did you get out of it?

How did you find out that it was available?

We talked about the future ... let's get a little speculative ...

If you could be anything that you wanted ... what would you be... does that fit into the future with the types of training we've been talking about?

What type of training do you need? Is it realistic to think that you could achieve that?

Where would you get the training required?

Let's be a bit more practical ...

What skills or training do you need today to ensure yourself employment in the future?

What have you done to get those skills?

What limits your ability?

How are you going to overcome those limitations?

What, if anything, should people in this area be doing to get ready for the changes that are taking place in this country in terms of the types of work available ...

What, if anything, should the schools be doing to get young people ready for the changes?

What, if anything, should the governments be doing to get ready for the changes?

What, if anything, should business be doing to get ready for the changes?

MCADAM

Joseph: 25 years old with grade 7 education. Not actively looking for work - going back to job in April hopefully. Heavy equipment operator.

Mary: 41 years old with a high school diploma. Unemployed and not actively looking for work.

Donald: 43 years old with a grade 8 education. Unemployed and actively looking for 12 weeks. Worked cutting bushes for NB Power and as a road construction labourer.

Robert: 55 years old with a high school diploma. Unemployed but may be starting a job on Monday. Contractor - crane operator.

Mary-Lou: 40 years old with a high school diploma. Employed part-time as a bartender.

Kathy: 36 years old, did not graduate from high school. Employed part-time as a waitress.

Caroline: 36 years old with a high school diploma. Employed part-time as a customer service clerk in a bank.

Steven: 30 years old with a high school diploma. Employed full-time as a heavy equipment operator.

David: 17 years old, not a high school grad - but is considering going back. Employed full-time installing carpeting.

Moderator's Guide
Charlotte County Groups

Introduction

Present Discussion topic

Ask participants to tell a little about themselves

If employed - what they do for work and for how long

If not employed - what is your work experience - how long have you been unemployed

Future Direction

What do you think Charlotte County will be like in 10 years - in the year 2000?

What types of jobs will be here

Who will be living here

What will you be doing - is that what you want?

What will your children be doing then?

What would you like to see Charlotte County be like in the year 2000?

Things are changing.....

UIC

What do you think of UI - as it is today?

Would you like to see any changes in it? What?

What if there is no UI in 10 years - what will happen in Charlotte County?

What would happen if the rules were changed so that people only go on UI for the number of weeks that they actually worked?

Social Assistance

Is the fact that we have a safety net - social assistance - good for this region?

What changes in it would benefit this region?

What would happen if there were a requirement added that all people on social assistance who could work were required to be in some type of work program?

What if people on social assistance were required to be in a training program - would that have any effect on this area - what effect?

Training

A part of our research responsibility is to look at training needs and interests of residents of this area....let's talk about that.

What type of training have you taken....

Why did you take that?

What benefit did you get out of it?

How did you find out that it was available?

We talked about the future... let's get a little speculative....

If you could be anything that you wanted ... what would you be... does that fit into the future with the types of changes we've been talking about?

What type of training do you need? Is it realistic to think that you could be that?

Where would you get the training required?

Let's be a bit more practical ....

What skills or training do you need today to ensure yourself employment in the future?

What have you done to get those skills?

What limits your ability?

How are you going to overcome those limitations?

What, if anything, should people in this area be doing to get ready for the changes that are taking place in this country in terms of the types of work available.....

What, if anything, should the schools be doing to get young people ready for the changes?

What, if anything, should the governments be doing to get ready for the changes?

What, if anything, should business be doing to get ready for the changes?

ST. STEPHEN

8:00

Perry: 38 years old, employed f-t with a community college education. He is currently employed as a fisheries officer.

Roger: 47 years old with a university education. He is employed as a teacher.

Timothy: 33 years old with a community college education. He is employed as a maintenance electrician.

Simon: 40 years old and a community college graduate. He is employed as a mechanic.

George: 50 years old with a community college education. He is currently employed as a truck driver.

Morton: 38 years old and a community college graduate. He is employed as a carpenter.

Tom: He is 33 years old and a high school graduate. He is employed as a manager at a retail store.

Phillip: 33 years old with a high school education. He is employed as an aquaculture technician.

Ruby: 35 years old and a community college graduate. She is a waitress.

Bonnie: 40 years old with a grade 9 education. She is employed as a cafeteria worker.

Darlene: 42 years old with a community college education. She is employed as a cashier.

ST. STEPHEN

5:30

Medford: 37 years old with grade 8 education. He has worked at the flake board factory, pruning trees and at a fish processing plant.

Clark: 30 years old with some vocational school. He has been employed as a labourer in the aquaculture industry and as a door installer.

Dwight: 27 years old with a high school education. He has been employed at the flake board factory and with a fish processing plant.

Randy: 19 years old with a grade 10 education. He has been employed trimming trees, sawing wood and packing fish.

Rick: 25 years old with some high school education. He has been employed driving a muskeg and forklift.

Martha: 30 years old with a high school education. She has been employed as an office manager and lab assistant.

Debbie: 37 years old with a grade 8 education. She has been employed as a labourer with the Department of Transportation, and as a forklift operator with a fish processing plant.

Bonnie: 33 years old with a high school education. She has been employed as a flagger and a family support worker.

Shirley: 40 years old and a community college graduate. She has been employed as a cashier, short-order cook and retail store manager.

Patricia: 40 years old with a grade 9 level education. She has been employed as a fish cleaner.

Margaret: 52 years old with a high school education. She has been employed cleaning blueberries.

Business

Moderator's Guide And

Participant Profiles

Moderator's Guide
Business Discussion Groups

Intro:

Explain Purpose
Taping
Have People Introduce themselves and tell a little about their business

Perceptions of the Workforce

Describe for me - the typical Charlotte County Worker

and describe for me the typical Charlotte County business person.....

What's the major strength of the workforce - of the business community

What's the major weakness of the workforce - of the employer

How equipped are the workforce and the business community for the future

Do they need to change - how so?

Economic Development - Future Directions

In our survey of the business community, we asked for perceptions concerning major growth areas - people like you suggested that growth would be found in the following:

Aquaculture
Tourism

First of all, do you agree that these are the two major growth areas? Why or why not?

Are there any other areas which represent future development opportunities....

Can you give me specific examples of growth opportunities - let's ignore the changes that might have to happen - just give me some specific examples of growth

Now, what will have to happen in this area to realize growth opportunities

Probe for detail on each item mentioned - get specific examples

Are the needed changes possible - probable?

Test Scenarios

This area could end up with few businesses, few services and a population consisting primarily of older people - how likely is that?

The number of businesses which fail will continue to rise -

Training In your Business/Planning Ahead

We asked business people if they provided training for their employees - and a surprising percentage did - but most of it seemed to be OJT - I think of that as orientation - do you offer training or orientation

What about the skills needed in the future - do you see any real change in skill demand in your business

If you controlled the training funds provided for this area - what would you do - what would you offer

Business - Focus Group

2:00 p.m.

Respondent has been in the retail business for over twenty years; employs thirteen people.

Respondent has been in the retail business for over ten years; employs six full-time people and four part-time people.

Respondent has been in the retail business for seven years; employs four full-time people and four part-time people.

Respondent has been in the retail/tourism business for three years; employs five seasonal people.

Respondent has been in the retail business for twenty-five years; employs one person.

Respondent has been in the retail business for three years; employs five full-time people and one part-time person.

Respondent has been in the hospitality industry for three years; open year-round and has two employees.

Respondent has been in the hospitality industry for over twenty years, open seasonally; employs ten people.

Respondent has been in the retail business for over twenty years; employs a number of people, both full-time and part-time.

Business Focus Group

6:00 p.m.

Respondent has been in the manufacturing business for over thirty years; seasonal and has one employee - part-time/seasonal.

Respondent has been in wholesale business for four years; employs two people.

Respondent has been in the construction business for six years; employs three people.

Respondent has been in the repair business for sixteen years; employs three people.

Respondent has been in the manufacturing business for three years; employs ten people.

Respondent has been in the wood products business for nine years; employs a number of permanent and seasonal people.

Respondent has been in aquaculture for three years, year-round; employs five people.

Respondent has been in the landscaping business for one year; seasonal; employed eighteen people in 1991.

Respondent has been in agriculture for twenty years, year-round; employed four people in 1991.